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Dehner Boot Company of Omaha, Nebraska: A study in manufacturing geography

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DEHNER BOOT COMPANY OF OMAHA, NEBRASKA:

A Study in Manufacturing Geography

A Thesis

Presented to the

Department of Geography/Geology

And the

Faculty of the Graduate College

University of Nebraska

In Partial Fulfillment

Of the Requirements for the Degree

Master of Arts

University of Nebraska at Omaha

by

Larry J. Mastin

May, 1998

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THESIS ACCEPTANCE

Accepted for the faculty of the Graduate College,
University of Nebraska. In Partial fulfillment of the
requirements for the degree Master of Arts, University
of Nebraska at Omaha.

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ABSTRACT

DEHNER BOOT COMPANY OF OMAHA, NEBRASKA

A STUDY IN MANUFACTURING GEOGRAPHY

Larry Jay Mastin

University of Nebraska-Omaha, 1998

Advisor: Dr. Charles Gildersleeve

This study addresses and follows the changing nature and character of the Dehner Boot Company of Omaha, Nebraska between 1883 and 1997. It examines the spatial (or geographic) patterns of change the company followed through its conception outside the gates of Fort Riley, Kansas, its influx of orders forcing it to seek a new facility in Wichita, Kansas, and the internal problems forcing the company to divide. This study used methodology proposed by Ann Markusen searching for qualitative data through interviews with the past and present president of the company to unravel the decision making process that forced the company to settle in Omaha, Nebraska. It researches the key decisions made during periods of profitability (early Nineteenth century), drought (1930s), war (1940s), and market loss (late 1940s) when the horse fell out of vogue. It examines the decisions made by company to focus on niche

segments within the equestrian and law enforcement worlds, carving out a place in order to survive in the regional, national, and global markets.

As a result, this company has become a two million dollar success, satisfying markets not profitable to the larger companies, even through the product is labor intensive, and when many companies are moving overseas for cheaper labor. The Dehner Boot Company represents the successful management of assets, resources, people, and marketing techniques that should be studied by city planners as they establish city industrial plans and small businesses as they try to choose the optimum location.

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Chapter 1

INTRODUCTION

1.1 Introduction

Why do some companies fail and others become successful, when all companies occupy space within the same geographic area and serve the same consumer market? Is it due to conglomeration and the downfall of the local markets to support this antiquated idea; or is it the ability of the company to adapt to the ever-dynamic market desires? This is a question that faced many companies during the early part of the nineteenth century and today. Whether it is better to suffer the throes of conglomeration in the large consumer based markets or to follow the path of niche marketing and survive the demanding requirements of regional markets, or is it the two-fold issue. That is the question that haunts some of the largest and smallest businesses in today's global markets. Stay the sturdy course and possibly sink or cast the marketers to the cost of consumers, study and model the successes of others, downsize, and cater to a smaller market base within a specific region (regional, national, or global) are the popular options.

1.2 Significance of Industrial Location

The above offers some of the issues studied by industrial geographers. They are important for two main types of reasons. One is the answer of pure science. The way in which industrial activity is distributed over space reflects the nature of our economic life; one aspect of the way our society works. In order to improve society, we ought to know how our society works; it is a matter of understanding ourselves by expanding our knowledge of industrial location (Webber, 1984).

The second has to do with practical applications. First, location of industry affects people in their everyday lives. If you want to work in a particular kind of job, where do you have to live? If you live in this particular city, what types of jobs are available? In planning your future, you should know where jobs are and how they are changing. But also in thinking about your future, you should be aware of the kinds of changes that have affected earlier generations of workers. Speed with which technology takes away jobs in one region of industry and adds them in another (Webber, 1984).

Further, governments have an interest in industrial locations. Industrial growth and decline, and the places

of growth and decline, determine unemployment rates in different parts of the nation: can local industrial policies reduce unemployment rates? Do welfare policies affect the location of industry? The growth of industries in a city or state affects the number of jobs there (and so the services required) as well as the governments' ability to raise taxes to pay for those local services (Webber, 1984).

Finally, the location strategies of firms influence the policies of unions. Workers' unions try to unite workers in a struggle for better pay and working conditions; firms naturally attempt to avoid places where unions are powerful. So if an industry is fixed in a location, workers have a powerful bargaining position. But if firms can easily escape places where unions are powerful, cities need to develop offsetting strategies. Thus cities and other companies learn from the study of industrial location; how a changing economic environment affects the economy of local regions and how that, in turn, influences their decisions.

1.3 Changes in Styles

Some time ago there were hundreds of small companies, all vying for the same customers within specific

geographical regions, pondering this question. Each believing, in order to flourish, they had to produce the same products as everyone else. The problem that eventually arose was the limited number of customers within that specific geographical area. With everyone producing the same product, customers did not need to shop around. Consumers simply went to their nearest general store and bought what was available. This was great for the buyer, as it required few decisions to be made. However, it wasn't good for the company, as people did not buy a large assortment of shoes, as fashion was not a staple for surviving in developing America.

In the mid-1800s European emigrants escaping famines and suffering within their own countries began to flood America with cheap skilled labor. They brought new ideas for manufacturing and the desire for fashion, European fashion. American consumers were no longer satisfied with the bland colors as women's fashion sprang to life, creating new demands for clothing accessories; particularly shoes (Clark, 1929).

Following the First World War, fashion began to dominate people's lives. As America's adopted styles set down from their European counterparts, shoe companies

were eager to satisfy. With their concept of conglomeration, shoe companies flourished by feeding the country's hungry desire to look and feel better. Competition became fierce, as companies began to buy competitors and form larger companies. Larger companies bought other large companies to form industries, centralized around a nucleus; make the same shoes as everyone else; compete in the same markets (near and far) as everyone else; and make money, so the company can grow (Clark, 1949).

Everything was positive as companies competed in regional markets and eventually national markets with great success. New England was the centerpiece then, as the shoe industry first established itself within an area where the leather tanning industry could supply the raw materials.

Through the 1910's and 1920's, the country saw a continued rise in the number of boot and

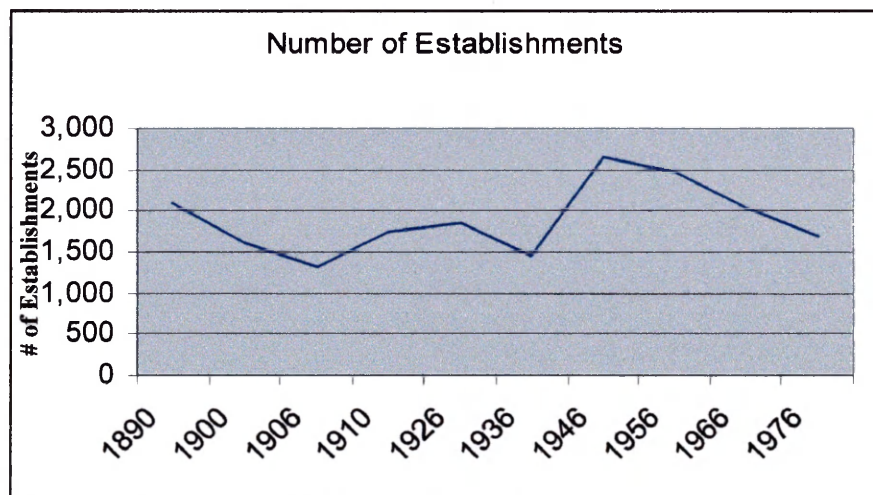


Figure 1. U.S Census data from 1890-1976.

shoe manufacturing establishments as the demand for fashion footwear increased greatly (Figure 1). World War I placed heavy demands on the shoe industry as young men marched off to war and the roaring twenties uncapped the fashion desires of people in the big cities, like Chicago, New York, and Washington, D.C.

During World War II, the Army, essentially still a cavalry entering the modern age, required riding boots for its soldiers. Likewise, the equestrian world was alive and well with polo and horse racing heading up as the popular sports among the wealthy. Both sports required special riding gear, particularly a good pair of boots in order to compete or at least look good.

The thirties were not as kind to the shoe industry as approximately 400 establishments folded during the depression (Census of Marketing, 1940). People simply did not have the money to spend on fashion or their favorite sporting event. Establishments depending on regional markets were forced to close their doors or sell to competitors, thus allowing bigger and more diverse companies to move into the now starving markets. However, expansion and conglomeration was still the venue for the day. Then, in the late thirties and early 40's America

saw the emergence of a new market theory--niche marketing.

1.4 Niche Marketing

The niche marketing (market segmentation) society demands a more definitive approach to marketing. To effectively communicate with a diverse audience, companies must be able to clearly identify, understand and respond to the needs of people from a variety of backgrounds. Utilizing intense primary and secondary research, a niche marketing company can identify and target specific groups for their product or service. But, what is a Niche:

1. It is a target market which has needs sufficiently different from a broader market that a firm employing a focused, specialized strategy can achieve a low-cost and/or a unique capability for servicing that market.

2. Although often smaller in size than the general market, there is not necessarily a size constraint (e.g.: IBM in mainframes up until 1986) or a geographic limit (Rolls Royce has a global niche).

3. It should not be likely to be absorbed into a broad line supply situation like PC's and laptop computers were.

4. It should be a lasting opportunity (super computers) and not a fad (wine coolers) with lower barriers to entry.

5. Ultimately, it should be a game that you can win and be a dominant No. 1 or a strong No. 2; otherwise, re-

define the boundaries to create a game you can win (R. Garda, 1986, p. 19).

But why is niche marketing possible and preferable?

As the free world-economy grew wealth, human beings identified more micro-needs (niches). As economic trade expanded, it became more competitive for the 80 percent, plus of all purchases which are mature commodities in the eyes of experienced repeat buyers. People began to purchase only what they needed, as opposed to what they wanted. Thrifty but fashionable, became the motto of the early forties, as America and the world plunged into World War II. Industries turned to manufacturing war material to support the boys on the front (Fuchs, 1962). The Army still relied on horses early in the war or on the foot soldier to battle for freedom; both required massive amounts of footwear. As mechanization was introduced into the war new footwear was required to support the rigors of riding the new iron horses. Few companies were prepared to alter their equipment as cost and manpower training was prohibitive. But smaller companies like Dehner Boot Company (pronounced Day-ner) in Omaha, Nebraska, took the chance by adapting to the environment (D. Ketzler, 1992). When the war ended in 1945, many large companies were not prepared for the lack of a

large companies were not prepared for the lack of a market for the boots stockpiled in their warehouses. Many were not prepared to switch back to civilian shoe production, plus shortly after World War II horses passed out of every day life in America. Even the U.S. Army shifted away from the horseback cavalry and the need for the everyday use of the riding boot (D. Ketzler, 1992).

1.5 Survival

A large number of boot and shoe industries survived the depression and the 1940's early on because World War II demanded massive amounts of footwear to keep the

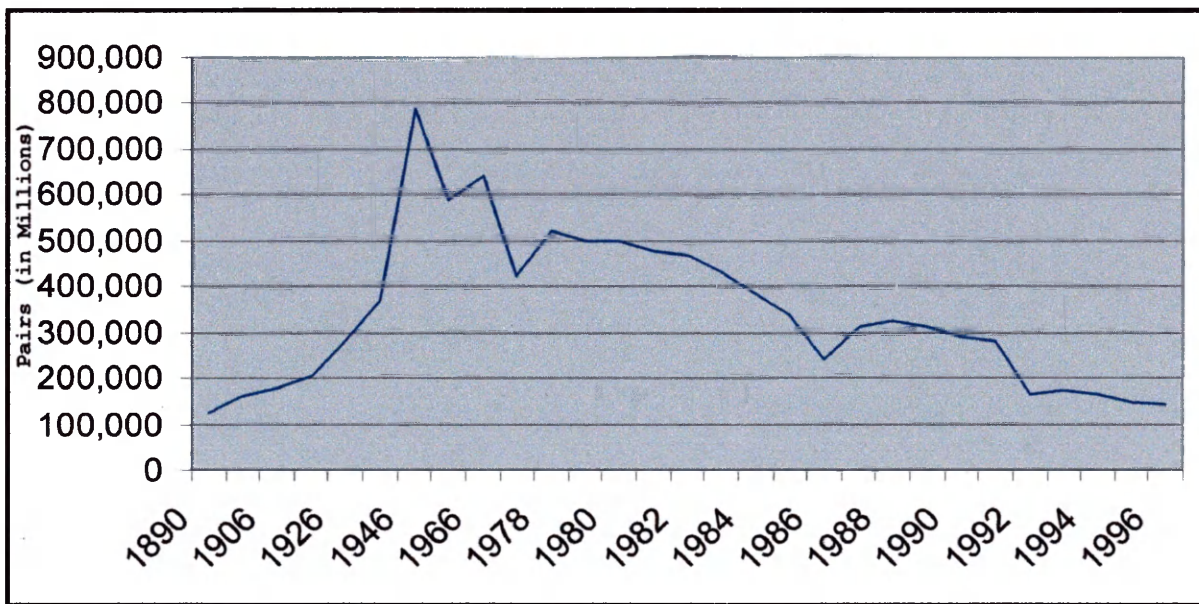


Figure 2. U.S. Census of Manufactures, 1900-1996

armies marching. In 1944 the replacement value of the country's manufacturing facilities was estimated at \$75

billion by the war production board (Statistical Yearbook, 1959). While the estimated value of all plants in 1939 was only \$49 billion, which indicates that \$26 billion worth of additional facilities were built during the second world war period of expansion. In 1948 the United States alone produced over 479,630,000 pairs of shoes (including boots). However, in the 1940's the average life span of a business enterprise in the United States was 66 months (Garda, 1986). This fact perhaps as any other, focuses attention upon the unstable nature of the economic system. In no realm of economic activity is instability more apparent or bewildering than in the field of manufacturing.

Nevertheless, the industry fought back until 1957 when the United States produced a record of 597,648,000 pairs of

shoes
(Figure
2). In
1958, this
figure had
fallen to

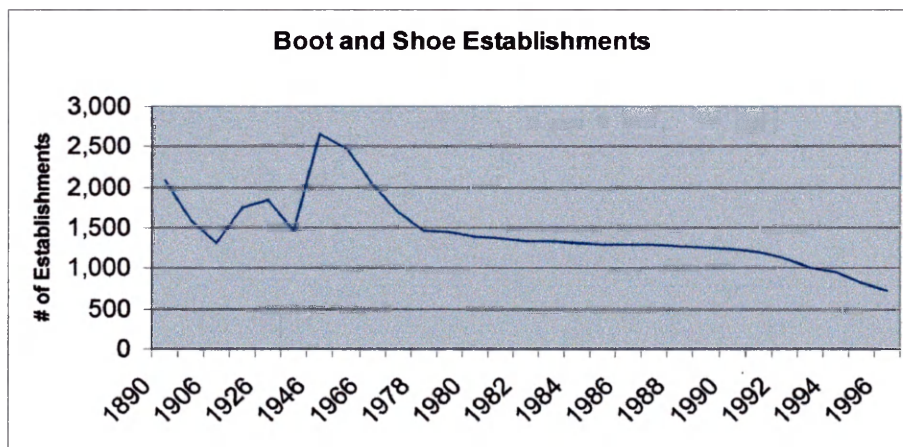


Figure 3. (U.S. Census of Manufactures, 1880-1970)

582,386,000 pairs of shoes (Statistical Yearbook, 1959);

and it has continued to fall ever since, leaving only 730 boot and shoe manufacturing facilities operating in the 1990's (Figure 3).

Today the remaining domestic companies (mainly located in the New England States and the Upper Midwest Belt of Wisconsin, Michigan, Iowa, Missouri, i.e. (See Appendix 3) operate on two major rules of conduct. First: produce the best product possibly in order to keep the customer happy and coming back for more; and second: find that special market niche where you can grow. But does niche marketing work within a geographically limited area? Several companies will definitely argue yes. One company that is an example of these survivors is the Dehner Boot Company of Omaha, Nebraska. About the only thing that has changed drastically around the Dehner Boot Company over the past 115 or so years is the size of its annual sales (Kelly, 1995).

It is a company that transitioned through the drought periods when raw material sources and markets changed; it endured the decline of the market following World War II; and finally it found special marketing

niches of recreational horse people and law enforcement officers.

1.6 Statement of Problem and Purpose

The connection between private sector firm behavior and regional growth and development has been a central and fruitful avenue of inquiry for regional planners, economists, and geographers for several decades. A number of distinct approaches have been tried. By extending the neoclassical theory of the firm to the spatial dimension, economists and regional scientists from the 1920s onward initiated a rich body of deductive work on location theory and descriptive work (Losch, 1954; Christaller, 1966; Isard, 1956). A more inductive effort, linked to the New York and Pittsburgh team studies of the late 1950's, yielded important work on agglomeration economies (Chinitz, 1960; Vernon, 1960). By the late 1970s, scholars working from a multidisciplinary and dissident tradition studied regions as a function of globalizing industries (Massey and Meegan, 1978; Bluestone and Harrison, 1982; Markusen, 1985). More recently, the focus has shifted from industries to firms, incorporating earlier work on the geography of enterprise and the clash over whether or not a new form of indus-

trial structure, "flexible specialization," has supplanted Fordist tendencies toward global production (Markusen, 1994).

Many a well-intended research project has been beached for lack of sophistication, where an interviewer ends up closeted with a recently hired public relations director who possesses no knowledge of the history of the firm. And is keyed in only to those issues on which the firm currently cares about projecting a certain image. This is not such a problem with a small firm where an owner or top manager wears many hats. But for large firms with thousands of employees and hundreds of specialized managers, it can be a nightmare. Regional economists and economic geographers are often relatively ignorant about the internal structure of large corporations and do not possess even a minimal mental map of who makes what decisions and why (Markusen, 1994).

This study now continues with a discussion of the literature which forms the backdrop for answering the question of how and why Dehner Boot Company has been successful in capitalizing over time by focusing on a niche area of production and marketing.

Chapter 2

LITERATURE REVIEW

The geography of manufacturing in the past was concerned with the description and interpretation of reality rather than with the development of abstract theory. As a result, economists and not geographers developed industrial location theory (Chisholm, 1966). Until rather recently industrial location theory was primarily based on either Weber's least-cost theory or on Losch's greatest profit which provided the basis for modern-day interpretations (Chisholm, 1966). Melvin Greenhut attempted to synthesize the two approaches and Walter Isard evolved a general theory based on the principle of substitution (Greenhut, 1956).

2.1 Location Theory

No completely satisfactory industrial location theory has been formulated out of the above attempts. Spatial variations in demand and costs make the formulation of a practical industrial location theory extremely complex. It becomes even more difficult when it is recognized that spatial factors are dynamic rather than static situations.

The need for investigation of specific industries and/or firms is great. As it is, the study of successful firms leads to the development of more such companies, because they have lived through the trials of methods that

failed and survived to develop programs to succeed in the regional, national, or global markets, which is a key element in theory. On the other hand, studying the failures of others prevents the same mistakes from happening again; for let us not forget the old phrase, "if man does not study history, he is bound to repeat it (Author Unknown)." Much of the evidence pertinent to such an investigation is found in company records, in written opinions of business leaders, and in other forms not susceptible to easy quantitative measurement. There is, however, an elaborate record of industry in the United States Census of Manufactures. The data published in these reports have not yet been fully analyzed for the purpose of discovering what light they throw on the problem of location (Thompson, 1933).

In geographic study of manufacturing in the 19th century, two fundamental problems of method must be resolved. First a suitable measure of manufacturing must be decided upon; second, an analytical approach must be selected which is appropriate to the data available and the goal prescribed (Michl, 1942).

The measurement of manufacturing, of necessity, is restricted by the nature of available data. In the United States the principal source for statistical data is the Bureau of the Census of the Federal Government. Among the kinds of information on manufacturing gathered by the Bureau at various census dates are value of product, value added,

wage earners, salaried personnel, capital invested, labor costs, number of establishments, etc. As one might expect, with improvement in technique, facilities, and legislative appropriation, the quantity and quality of the data recorded by census have improved over the years (Smith, 1971).

However, the progressive elaboration of the census data collected has very often made difficult a comparison of any one parameter over an extended period. In addition to changes in definition, the comparison over time of those measures involving dollars require adjustment, as inflationary and de-inflationary trends in the economy were manifested in greatly fluctuating money values. Such difficulties as suggested here have not precluded the use in various studies of most of the measures mentioned above (Smith, 1971). Economists and economic geographers with a certain amount of special pleading for the criterion selected and with the required circumspection of their data have tackled the problem of measurement and usually resolved it satisfactorily in relationship to other industry they studied (Moses, 1960).

Such is the case of the steel industry which has a much greater share of its market in alloy steels and reinforcing bars, relative to its staple carbon steel items, than it did thirty years ago. These new major products require different kinds of production facilities and therefore have

quite different labor requirements and produced tremendous change on the company for it also has implications on economy of scale. An earlier classic case of this occurred in the late 1940's when manufacturers of bathroom fixtures decided to make them in many colors, rather than in the previous, ubiquitous white. Additional inventory meant additional storage facilities and additional order processing; the effect may not be significant in most cases, but it should be recognized as a possible factor (Smith, 1981).

In other cases, however, change is regular and institutionalized. Examples are the periodic model change of cars and appliances and in apparel, the long established need to come up constantly with new items. Then there is the occurrence in the cigarette industry, of which there are now some 175 brands, a far cry from the time some thirty years ago when 6 brands accounted for much of the market. Another example is that of soft drinks: Pepsi-Cola and Coca-Cola are now in eleven versions depending on whether they contain sugar or caffeine or "new" or "Classic" syrup (Smith, 1981).

2.2 THEORETICAL FRAMEWORK

Formal location theory provides an analytical approach to the geography of manufacturing (Losch, 1954). Whether from the pen of Weber, Losch, or Isard, such theory is cognizant of the economics of space where the factors of

production and markets vary from place to place in quantity and quality. Exactly how far Weber's theories are supported by the actual occurrences of business in the United States over the past decades might be determined in certain cases by detailed factual studies of industries (Hoover, 1937). Such a plane or surface characterized by an uneven distribution of raw materials, labor, capital and markets can yield upon examination something approximating an optimum location where introduction factors are the least expensive and from which transfer costs to the market are the lowest attainable (Noble, 1984). Location theory does precisely that--it sets the conditions for a maximization of profits. Ideally, this can be the assumed goal in a free enterprise system. Insofar as location theory can adequately point out an optimum location (there is no reason to expect infallibility) and it can serve as a predictive device (Isard, 1956). It can assure the entrepreneur that he is in the right location or it can inform him that he is not optimally located and must move or suffer the consequences of poor location--failure or, at the least, something less than maximum profits (Noble, 1984). Without being in any way disparaging, this theoretical approach to economic location and its demonstrated utility would appear that such an approach is of limited use for the task at hand.

An underlying assumption of location theory is rational economic behavior and the conscious pursuit by entrepreneurs

of maximum profits with knowledge of conditions. It must therefore assume a certain amount of knowledge, which will facilitate the decision-making process. Can one assume such knowledge on the part of the decision-maker? Certainly not, especially if one is familiar with the early history of manufacturing in New England. Thousands of decisions bearing upon manufacturing were made in comparative ignorance of the conditions, including location, which would maximize profits (Clark, 1949). The random element in the early manufacturing pattern of New England is in part a reflection of this ignorance. Location theory would further prove inadequate in explaining this manufacturing pattern because of the role of "accident" in the early economic history of New England (Clark, 1949). The fortuitous conditions, which gave rise to manufacturing in certain places, could hardly have been predicted and could not be explained by theory alone. For example, the role-played by Samuel Slater in the history of the textile industry in New England. What would have been the effect of his being beckoned not to Providence but to New Haven or Hartford by the counterpart of Moses Brown in either of those cities (Greenhut, 1956)? It is inconceivable that had such an event taken place, the manufacturing pattern of New England could be substantially different from the one that actually emerged. From his study of diffusion in Sweden, Hagerstrand concluded that,

"When making a statement concerning some distribution we often risk supposing a phenomenon in stage

I or II the early and intermediate stages of the diffusion process from a center of innovation to be determined by favorable conditions with about the same distribution. Instead a better explanation may be that a start was made in some place by mere chance, after which the diffusion mechanism began to operate through the network of social contacts, thus forming a distribution ("region") which could have been located otherwise, all things being equal. This view is perhaps applicable to many in industrial regions with a puzzling location." (emphasis added) Hagerstrand, 1952)

Therefore, one might construct a theoretical model by which a test could be made on an empirically derived manufacturing pattern, but this would be not so much an explanation of the pattern as a commentary on the inapplicability of the model as a device to answer the question--Why? Clearly, there was felt the need of an alternate theoretical approach to the data (Hagerstrand, 1952).

Economists have recognized the difficulty in ascribing to the entrepreneur the conscious pursuit of profit maximization and in acknowledging the fact that the necessary information is available for the pursuit of that goal. In fact, a theory was formulated which in part sought to circumvent the problem of purposeful profit maximization on the part of the firm. It draws an analogy between the behavior of the firm and the theory of natural selection in the biological sciences (Barone, 1984).

2.3 Adoption or Adaptation

Professor Alchian provided a seminal statement of the theory (Alchian, 1950). Briefly, the theory states that

firms achieve success (profit maximization) or fail as a result of an economic environment (system) which "adopts" certain firms (by accepting the firms' ideas and policies) or selects for survival those which adapt to the economic environment, "through imitation, alteration of economic plans, etc." The emphasis is, however, on an active environment working upon passive firms for whom the environment is essentially beyond their control (Alchian, 1950). Alchian admits that it is not so much the decisions made as chance that produces success or failure. Natural selection in the theory of the firm does not require that firms make decisions -- even if made, they are of no consequence. The theory as proposed by Alchian has been criticized primarily because of its emphasis on the element of chance (Raynor, 1992). A thorough application of the biological theory to the firm cannot make the assumption that firms are powerless to alter the economic environment, for natural selection implies competition and individuals that are active rather than passive. The assumption of profit maximization must, therefore, be made. A more recent review and critique of the theory has argued against the assumption that firms have goals or that these goals can necessarily be embodied in the term profit maximization (Taylor, 1975). At any rate, profit maximization is deemed impossible as a consciously sought goal since the necessary information is considered generally unavailable, or if available, too costly. If economists have

yet to conclude on the applicability of natural selection to the theory of the firm, they have provoked inquiry in one ancillary field (Taylor, 1975).

Alchian was nowhere explicit in his article on what constitutes an economic environment other than to point out that it was made up of variables. One important variable and component of that environment must certainly be location (Taylor, 1975). Charles Tiebout, using the Alchian article as a point of departure, has sought to demonstrate the utility of natural selection when examining the location of manufacturing. Firms engaged in manufacturing are assumed to be capable of seeking out an optimum location, but in the absence of complete knowledge can do this only by trial and error. Insofar as a firm chooses its location it is adapting itself to the economic environment (Johnson, 1981). The observation is made that models derived from classical location theory appear to be confirmed by empirical evidence that firms do actually find the optimum location and thereby adapt themselves to the environment. That firms do not have perfect knowledge does little violence to the model for, when viewed from the perspective of an environment that adopts, the empirically derived manufacturing pattern is what one would expect:

"All we need to postulate is a sufficient number of firms starting out at various locations. Next we let evolution and the economic system pick out the survivors. If enough firms start up and the economic system gets to pick and choose, it would

not be surprising if reality yields results consistent with optimal conditions. And all of this, of course, can take place without assuming that the firm can find the path to the optimum location." (Tiebout, 1957)

The assumption is clearly made here of the firm with incomplete knowledge that acts, but in an uncertain manner, never sure that its decision (specifically on where to locate) will produce maximum profits (Tiebout, 1957). With incomplete knowledge on the part of the firm and an economic system that is evolving and whose conditions of success are changing, the economic environment can be viewed as adopting and capable of being adapted to:

"Insofar as surveys show that firms do try to find the optimal location, they are adapting to the economic environment. On the other hand, to the degree that firms cannot find the optimal location (but we find an optimizing pattern), we may conclude that the lucky ones were adopted by the economic system. Indeed, economic history.... suggests that this process gives a good account of many present industrial and commercial geographic structures." (Tiebout, 1957)

The firm for Tiebout functions unquestionably as a decision-maker somewhere between the polar conditions of complete knowledge and no knowledge. Between the poles there are only degrees of uncertainty. Where the pole of no knowledge is approached, the adoptive quality of the overall economic environment asserts itself. Firms have insufficient information to guide their decisions. Success will be largely a matter of chance rather than faultless decision-making; on the other hand, firms with abundant information about the economy can make their location decisions with some assur-

ance of success. In a parallel observation Pred notes that

"The adaptive-adoptive dichotomy represents a conflict between purely random and economically rational forces. Theoretically, at any point in time, geographical distributions stemming from the behavioral patterns of a given category of location decision-makers do not solely reflect either of the adaptive adoptive extremes but instead manifest various permutations of rational and irrational action." (Pred, 1966)

Some empirically derived geographical distributions, Pred also notes, have random elements supporting the validity of the theory. Success can be as much the conduct of chance as of rational decisions made with adequate information (Pred, 1966).

Borchert related the emergence of an urban hierarchy to specific technological epochs. With each major change in the chronology of manufacturing or transportation (and internal migration) a pattern of advantage exists favoring urban growth at particular places while sometimes making obsolescent any advantage that might have existed at other older centers, causing them to stagnate or to drop out of the hierarchy. Persistence of a center from one epoch to another required that "business and civic institutions organize to meet new challenges".... And occasionally "massive adjustments" have been necessary for survival (adaptive behavior) (Borchert, 1966). Lukermann's view of the process leads however, him to doubt the efficacy of adaptation as an explanation:

"The location process is better viewed as 'system adopting' or 'fitting'. It is true that towns aim at being towns, that decisions and resultant behavior are planned to some end, but the success of planning, the (acceptance) of the town into the hierarchy is not the planners or producers decision. In a very real sense the system or over-all economy has the decision making power. It creates its own environment. It pulls in the towns that fit. It adopts from a population of potential aspirants those that have a situation advantage, given the system." (Lukermann, 1967)

Thus, emphasis is on an economic system which is discriminating of location and which exercises a selection of its urban components (Lukermann, 1967).

Whether one necessarily defines the theory in terms of profit-maximizing goals, the postulate of decision-making firms combined with the element of chance is not an unreasonable way of viewing economic evolution (Cooper, 1968). The theory provides a perspective from which one may observe the emergence of the manufacturing pattern in New England. The pattern at any point in time in the 19th century will be a product of a dynamic economic system which prescribed the conditions for success and in which were born firms whose progress ultimately depended upon whether they fit the environment. Their fit and subsequent adoption in turn can be related to the ability of each to decide, plan and act with varying degrees of knowledge (i.e., to make themselves adoptable) or to luck (Lukermann, 1967). This study will apply the above to explain the developmental success of Dehner Boot, using the ideas here and the

adaptations to niche marketing.

Chapter 3

METHODOLOGY

According to Smith the way has now been prepared for a more direct discussion of the problems of explanation and the development of the theory in the study of industrial location. A convenient place to start is the manner in

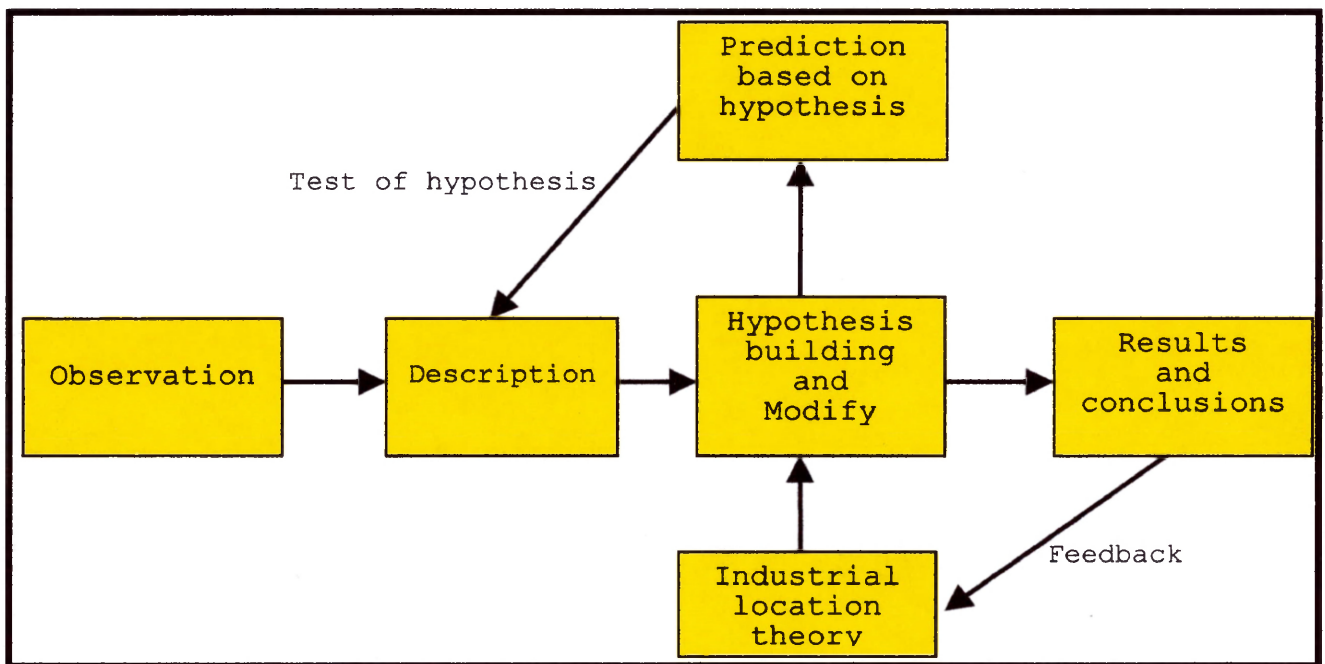


Diagram 1: Depicting the theory of Industrial Location

which scientific inquiry is commonly conducted. This is reflected in this sketch: and the various stages represented are as follows:

1. The identification of the phenomena, area or problem to be investigated. The nature of the topic may arise from perceptual experience (that is, an initial observation of some empirical situation that arouses curiosity), or it may involve the examination of some concept or hypothesis derived from the existing body of location theory.

2. Observation, or collection of data. This stage includes the various classification and measurement decisions, and some preliminary sifting and processing of data.
3. The descriptions of the observed pattern of industrial location, structure, or change, in cartographic or statistical form. This becomes a statement of the explanatory problem.
4. The development of an explanatory hypothesis, based on observed spatial associations or other empirical relationships, on a priori reasoning from theory, or on a combination of two. This may have been derived from an initial working hypothesis, used simply to get the inquiry going and refined to produce the test hypothesis--a formal statement of what is thought might be true.
5. The testing of the hypothesis. This generally involves predicting what should be found (for example, what form the industrial location pattern, structure, or change should adopt if the hypothesis is true), and comparing this with the actual situation. This is the stage at which a model might be used to test the consequences of the hypothesis and the theory on which it rests. Testing may lead to the modification of the hypothesis until either an adequate explanation has been constructed or the line of inquiry has to be abandoned as erroneous or inconclusive.
6. If the hypothesis was verified, a fact was established. It may take the form of a statement to the effect that the location of the industry is a specified function of certain variables, with the rider that this explains a given proportion of the observed pattern. If the result can be regarded as a general truth rather than restricted in its validity to a particular case, it may be said to constitute a universal law (Smith 1917).

This is, of course, only one way of looking at the organization of scientific research. However, it does seem particularly appropriate for industrial location analysis. However, formal scientific procedures cannot always be applied in practice, of course. Lack of data may mean that it is difficult or impossible to measure certain critical variables, and there are many cases where data are so limited or imprecise that not even a very simple quantitative model can be constructed to test the hypothesis. But whatever explanatory approach is adopted "whether it involves a sophisticated model or simply a loose verbal argument" it must rest on some kind of theoretical foundation. This is why location theory feeds into the investigation at the hypothesis building stage. And the expectation is that the results of the inquiry, if the research was properly designed, will provide some kind of feedback into theory (Smith, 1971).

The discussion of the place of theory in locational analysis raises some important issues. One of them is the question of the scientific status of locational studies, and human geography in general, which has still not been resolved to the satisfaction of everyone. On the one hand it is argued that it is possible to formulate laws or principles relating to the spatial arrangement of phenomena, and that geography capable of this is truly scientific. On the other hand it is held that all geographical phenomena

are unique, in location if in no other respect, and that because it is possible to go no further than explaining each individual case on its merits, geography produces general truths as a passport to scientific status (Smith, 1971).

Hartshorne (1939, 1959), Bunge (1962), Haggert (1965), Harvey (1969), and others discussed this problem at length. There now seems to be fairly widespread agreement that the uniqueness of areally distributed phenomena is not a logical barrier to the derivation of generalizations or law-like statements concerning locational behavior. Uniqueness does not imply that nothing is shared with other individuals, only that not everything is common to them.

3.1 Preliminary Matters

Manufacturing involves changing the utility of goods and hence increasing their value. The necessary materials have to be assembled at the plant, along with the factors of production required to undertake the process of manufacture. Then the materials are converted into the finished product, or output, which is subsequently shipped to the consumer. Transportation enters the picture both at the stage of material assembly and for the distribution of the finished product (Smith, 1971).

In setting up a factory a manufacturer must make three decisions, or sets of decisions, which will together determine success or failure. First is the scale of operations, including how much is to be produced and at what price it is

to be offered to the consumer; second is technique to be adopted, which involves selection of appropriate combination of factors of production; and third, location of the factory (Harvey, 1969).

The choice of location cannot be considered in isolation from scale and technique, since they are all interrelated. Different scales of operation may require different locations to give access to markets of different sizes, and if the location decision is made first this may have an important bearing on the output that the firm can reasonably expect to sale. Different techniques will favor different locations, as firms tend to gravitate toward cheap sources of the factors that they require in the largest quantities, and locations itself can influence the combination of factors and hence the technique adopted. All the information regarding these decisions are contained in corporate records or in the memories of corporate leaders (Smith, 1971). That information contained in memories can only be obtained by personal interviews with current and past corporate leaders such as the information for this paper about Dehner Boot.

3.2 Changes

The boot and shoe industry in the United States of America has undergone some major changes. Companies clamored to the top of the heap during the early days when labor and raw materials were cheap and abundant. Many fell or lost

ground when labor costs steadily climbed with the formation of labor unions, and major raw material companies relocated overseas to escape new governmental regulations. To survive, the boot and shoe industry was forced to expand its concept of marketing, to the larger, more diverse domestic markets of this vast new country and eventually to the global market place.

3.3 Methods

This study will address adaptability or adoptability using the framework of adaptability analysis, the ability of firms to dynamically align and realign themselves with shifting markets. Using its resources effectively, firms created new products and services in the boot and shoe area. As these products were commercialized, their properties were set, leading to customer dependencies, firm-specific knowledge, widespread use and new industry standards that facilitated the creation or accrual of economic rents.

In doing so, small companies across the country that would have normally gone out of business were able to survive by risking everything to develop these creative rents. As in the case of Dehner Boot, the creation of a high quality line of English style riding boots filled a niche in the equestrian and law enforcement worlds. One of the largest law enforcement markets is in California where motorcycles are used to patrol the vast miles of super highway. By filling these niches and several others

over its history, Dehner has been able to survive lean years and turn unprofitable markets, at least for the large companies, into profitable ones. Did Dehner adapt or adopt?

Perhaps it is both; either way, the company's rich history is one for all small business owners to study and emulate, as it exemplifies the theory of profit margin, chance, and adaptation/adaptation. Most of all, it firmly establishes that niche markets can provide profit for small companies by adapting to the changing markets, even though those markets are in the global environment, and by adopting new policies in business management as well.

Methodologically, evidence to test these newer theories has come increasingly from qualitative data, especially from interviews of firms and other industrial and regional actors such as trade associations, business service provider labor unions, and economic development officials. Interviews are useful for probing firm strategy and dynamics as behavioral phenomena in geographic restructuring (Schoenberger, 1991).

Much of this information for this study will be derived from personal interviews with the current president and past president of the company, along with the production workers that have been with the company for several years. This study will focus on studying the locations of the company and how it adopted the location for markets; and how it relocated in order to grow or survive due to split in the company. It will also evaluate the company's decision on

production lines and how it sought out new markets by incorporating new transportation and communication capabilities by narrowing its attention to niche markets in order to survive the lean years.

Chapter 4

THE DEHNER COMPANY

About the only obvious thing that has changed drastically around the Dehner Boot Company (Figure 4) over the past 115 or so years is the size of its annual sales. The \$2 million worth of boots and shoes Jeff Ketzler, president, expects



Figure 4. The Dehner Company

to sell will be made on some of the same sewing machines (Figure 5) and leather-working apparatus (Figure 6) that his great-grandfather purchased second-hand back during the 1930's (Kelley, 1995). This chapter proceeds with the



Figure 5. Sewing Machine development of Dehner's history, Omaha locations, later moves, and looks at issues of raw materials, markets, as well as other aspects of the company's functional and

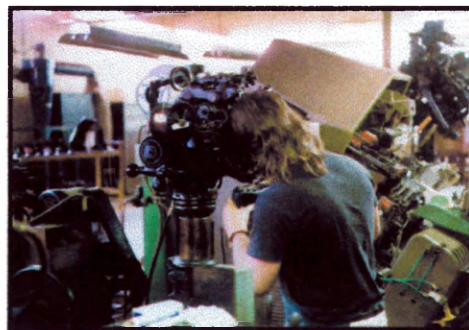


Figure 6. Leather apparatus

spatial evolution.

4.1 History

The 34 employees at the Dehner factory (Figure 7), located at 3614 Martha Street in Omaha, Nebraska, turn out between



Figure 7. Dehner Employee

30 and 40 pairs of boots per day, and they do it the old-fashioned way. Dehner craftsmen are proud of their worldwide reputation as being master of their trade. A reputation born of years of experiences in serving mili-

tary and riding personnel the world over. Skilled fingers that mold, rub, stitch and sew, combined with an aggressive style policy and a sixth sense of fashion-wise designing, have enabled Dehner to retain their leadership in the custom world of fine boots that fit to perfection from the first day worn. The process has won Dehner Company a national reputation as one of the premier manufacturers of English style riding boots and other footwear, mostly used while riding horses.

The history of the company can be traced well into the early 1880s near Fort Riley, Kansas (Figure 8) and the contribution provided to the country is immeasurable. By personal interviews with Jeff Ketzler, the current owner, and Mr. Donovan Ketzler (Jeff Ketzler's father and previous

owner), information on the history of boot making in the mid-west is brought to light. The location changes that the company has made over the past one hundred and fifteen years

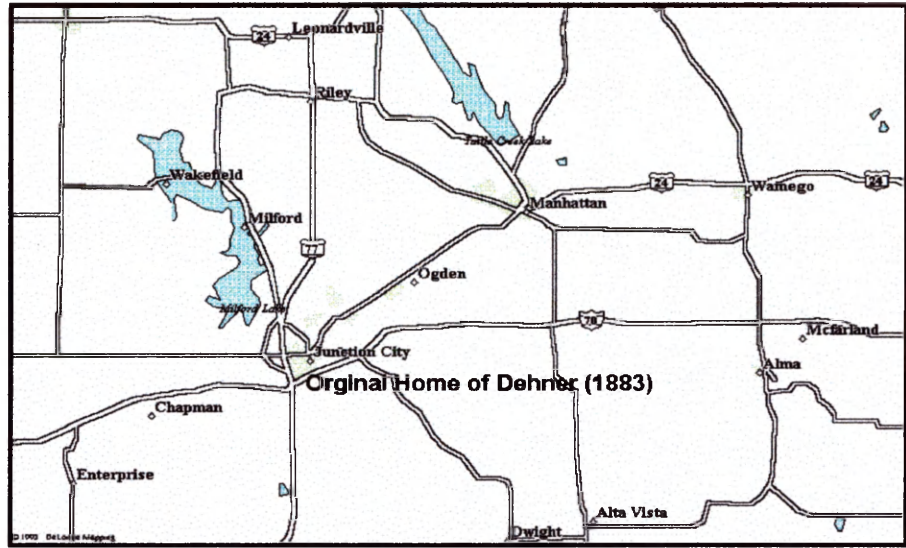


Figure 8. Map depicting Dehner location, 1883.

definitely show patterns of adaptation and adoption when selecting locations.

The parent company was originally located in Junction City, Kansas, near Fort Riley (Figure 8). The selection of this particular site was for the availability of an existing market. John Teitzel (Figure 9), a German immigrant, came to America in approximately 1883 to live with an older brother. His brother was a photographer with a shop just outside of the gates of the Fort. John was a cobbler and opened a shoe store on the local main street, with a small boot repair shop in the back of the store. Over the next three years John Teitzel struggled to produce the best

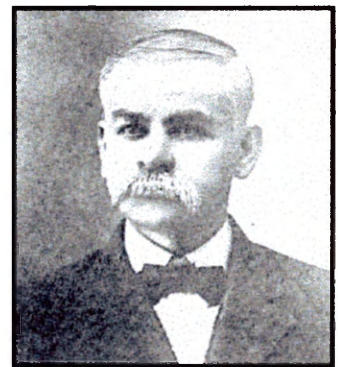


Figure 9. J. Teitzel

product available for the soldiers; eventually designing and

manufacturing his own line of boots. With the Fort being the location of the mounted school for the Army, Fort Riley provided a ready market for the Teitzel boot. In 1897 a salesman by name of Carl (C. C.) Dehner who sold a line of fining (shoe bindings)

became interested in the Teitzel line of boots. By 1897, Carl Dehner and John Teitzel merged and created the Teitzel and Dehner Company in Junction

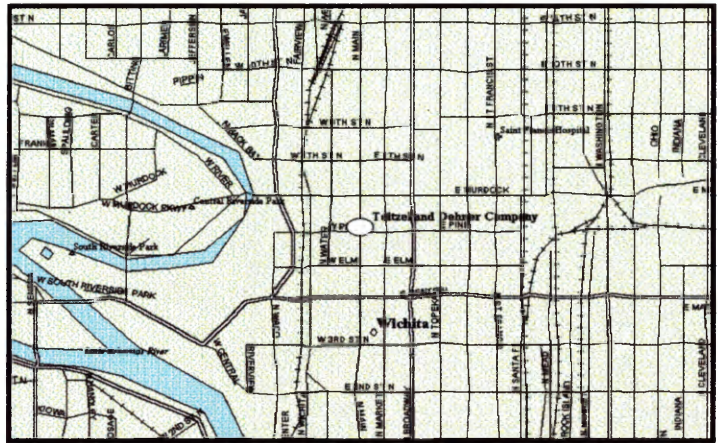


Figure 10. Wichita location

City, Kansas. Production thrived and business grew as the Army expanded, until approximately 1914 when the U. S. Army began to prepare for World War I. At this point the current facility could no longer handle the volume of orders. So Teitzel and Dehner Company moved their operation to the corner of Main and Pine Street in Wichita, Kansas (Figure 10). But the company lacked funds to fully expand. Thus a third partner, Skyler Jones was added. So now the company was reformed with Carl Dehner (the salesman), John Teitzel (the boot maker), and Skyler Jones (the financier) all making up the company of Teitzel, Dehner, and Jones. The firm flourished with demands from the local and regional markets supplied by the Army and the area horse enthusiasts from Kansas, Nebraska, Missouri, and Oklahoma (J. Ketzler,

1992).

In 1919, following WW I, Harold Ketzler returned to the United States and married the daughter of Carl Dehner, and started out at the bottom of the company. By 1928, Carl had worked his way up the corporate ladder to become manager of the company. Then in 1928, Skyler Jones Jr. graduated from college with a degree in business and several things began to happen which led to the company's original demise. John Teitzel passed away and Skyler Jones Sr. wanted his son to manage the company. Carl Dehner disagreed and demanded that Harold Ketzler remain as manager. The two partners, Dehner and Jones fought for control of the company. The disagreement resulted in the company being divided. Without the old boot maker to mediate the conflict, it was decided that Carl Dehner would sell his company stock to Skyler Jones Sr.

Jones stayed in Wichita, and eventually went broke (the building, however, still stands today). After six months of wandering and

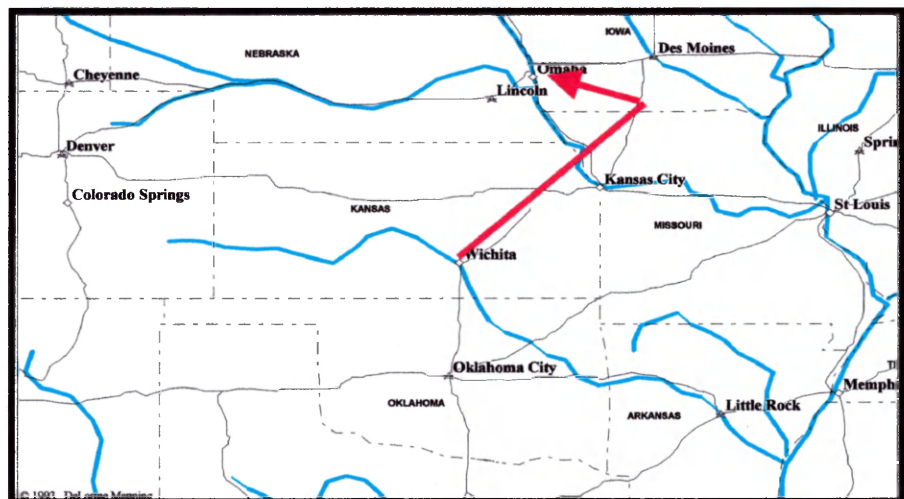


Figure 11. Map depicting move from Wichita to Omaha, Nebraska.

searching for a new location Carl Dehner traveled to Omaha,

Nebraska, to confer with Frank Dehner (a brother) for space (J. Ketzler, 1992).

4.2 OMAHA LOCATIONS

In 1930 Frank Dehner was in partnership producing artificial limbs at the Dennis and Dehner artificial Limb Company of Omaha, Nebraska (Figure 11). At about this time the requirements for artificial limbs was starting

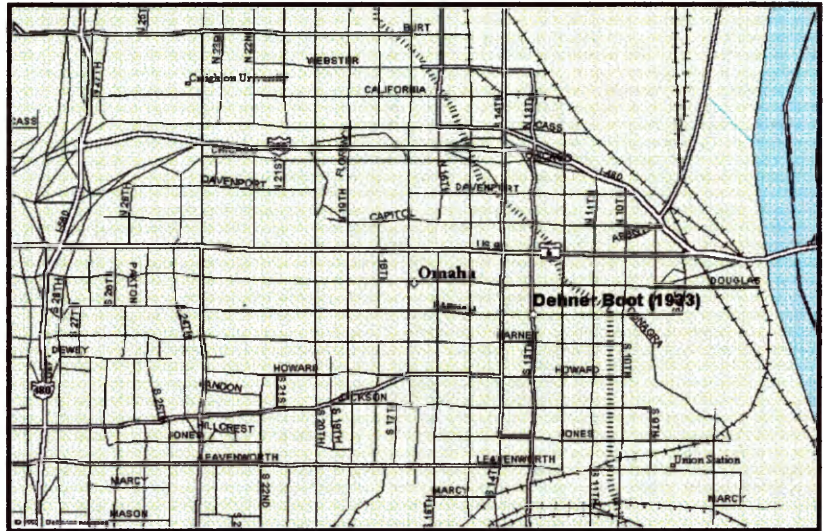


Figure 12. Map depicting Dehner's first location in Omaha, Nebraska

to decline and the company of Dennis and Dehner was forced to lay off much of its work force which opened up building space for other usage. With a stroke of luck, Carl Dehner had his new space to open the Dehner Boot Company. Carl Dehner then returned to Wichita and persuaded seventeen of Skyler Jones Jr.'s master craftsman to relocate to Omaha, Nebraska, where the Dehner Boot Company had hung its shingle at 1116 Farnam Street (Figure 12). Now the new firm had a building, but lacked needed equipment to increase production. Dehner subsequently found the equipment at the United Shoe Machinery Company in Lynn Massachusetts--the shoe-lasting machine invented by Jan Ernest Matzeliger

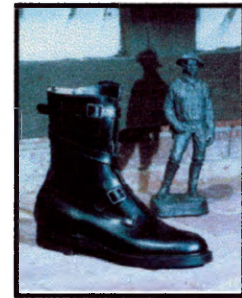
(1852-1889) that had revolutionized the shoe industry. The machines shape and fasten the leather over the sole of the boot. This process, previously done by hand, led to the ability to mass-produce shoes at reduced prices. The United Shoe Machinery Company owned over 90 percent of the lining machines in the country and would not sell them; only lease. So Carl leased seven machines for \$5.00 per month and so much a stitch. Thus in 1930, he now had a new company, the latest equipment, and skilled craftsman upon which to build his company (J. Ketzler, 1992).

Labor force was abundant in the local Omaha area; 1930 had brought the depression and a large labor force looking for work. Raw materials (leather) were plentiful throughout the country and in the city of Omaha from the local slaughterhouses. Although leather was abundant from the slaughterhouses and tanneries located in Omaha and surrounding areas, according to Donovan Ketzler, "the primary supplier for leather was the Ohio Leather Company in Youngstown, Ohio (D. Ketzler, 1992)." He also referred to a book that he retains as a memento that lists the leather companies within the U.S. in 1946. The book is approximately 1.5 to 2 inches thick indicating several hundred companies existed. Today, he says,

"the document is just a pamphlet containing only a few pages and is produced every five years."(D. Ketzler, 1992)

In 1933 Frank Dehner was in bad health and the market

for artificial limbs had withered. Frank Dehner left the company of Dennis and Dehner for retirement and the Dennis Artificial Limb Company moved to the second floor in the Merchant Bank building located at 13th and Farnam. Over the next ten years the Dehner Company grew finding new markets in the military and across the country in the equestrian world. In 1939 Carl Dehner began working with a fairly unknown supply officer by the name of George S. Patton to develop the now famous tank boot. In 1943, business had outgrown its existing facility. World War II had brought with it large demands for boots for the military. So the search was on to find a new and larger location for expansion of facilities.



Patton Tank Boot

The new facility was located at 2059 Farnam street (Figure 13). At that time the building was a show-room for an automobile dealership, with the repair area on

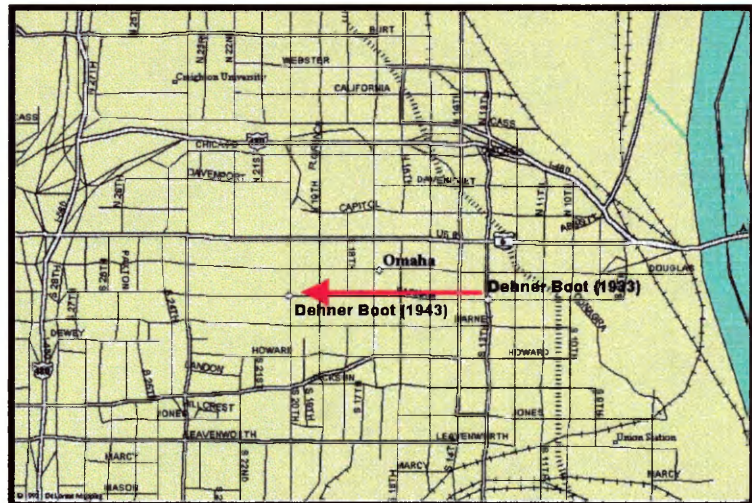


Figure 13. Map depicting move in 1943.

the second floor. By a stroke of luck, the new building came with it's own elevator. It seems when an automobile would come in for repair; an elevator would take it from the first

floor to the second floor. After two more years (1945), the company decided it needed to expand; so they purchased the building next door from Gould Dietz. However, Dehner was not able to utilize the space right away, because the business located there had tenant contract rights for another nine months. So for the next nine months Carl Dehner owned and collected rent from the building, which was the local warehouse. After the nine-month period elapsed, the company moved into the larger facility (D. Ketzler, 1992).

4.3 RAW MATERIALS

Although the company continued to flourish, its sources of domestic raw material did not. In

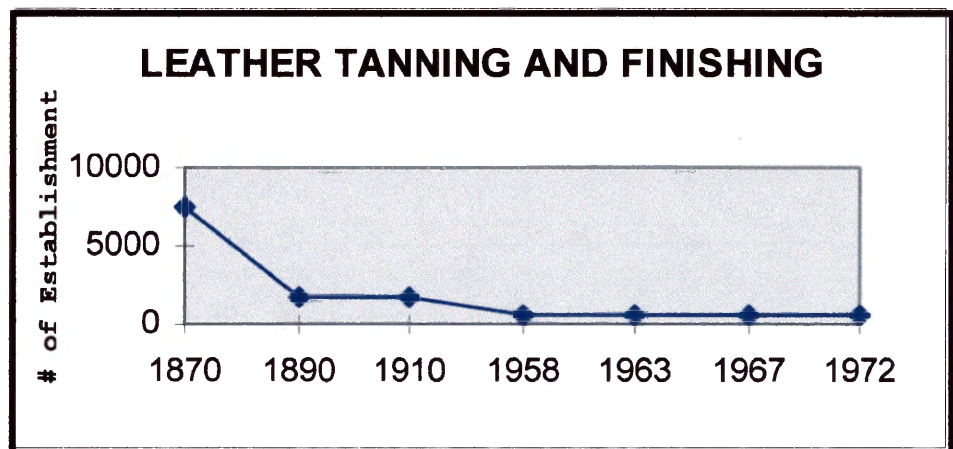


Figure 14. From U.S. Census of Manufactures, 1870-1972.

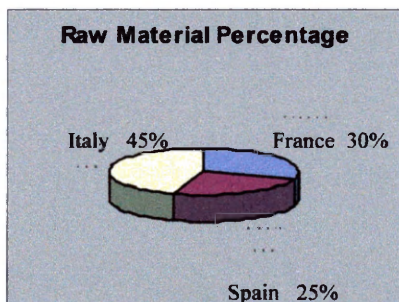


Figure 15. Raw Material

the mid-1940s the days of the large stockyards began to die. By late 1947--early 1948, the Ohio Leather Company and a mass majority of the U.S. tanneries had closed their doors (Figure 14). Many of the tanneries

were owned by old wealthy families who were unwilling to invest to meet the recently legislative governmental laws.

As a result, they closed and locked the doors and moved the companies overseas to escape regulations. As the domestic sources of raw material dried up, Dehner was literally forced to seek leather overseas. The tanneries of France, Spain, and Italy were the answer (Figure 15). For centuries, European leather experts produced fine

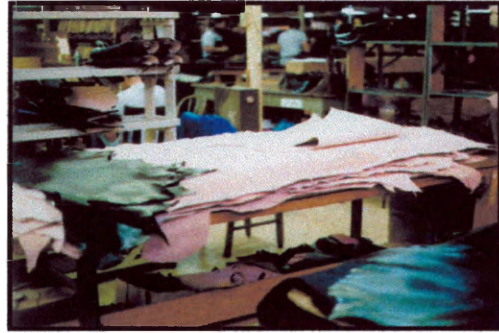


Figure 16. Raw Material

leather (Figure 16) for the boot makers of the royal courts throughout Europe and Asia (J. Ketzler, 1992). But having abundant raw materials does a company no good when the bottom of the market drops out.

4.4 Adaptation

Along the way, Dehner Co. has had to adjust to a changing marketplace. Shortly after World War II, Ketzler said, "horses passed out of every day life in America." Even the U.S. army shifted away from the horseback cavalry to a more mechanized force. Those changes left the Dehner factory looking for new customers (J. Ketzler, 1992).

"My dad and granddad were pretty much left to scramble," Ketzler said. "They had to develop a market completely from scratch" (J. Ketzler, 1992).

Law enforcement agencies provided an important group of customers for Dehner during that transition period and still make up a sizable proportion of its business today (approx-

mately 10 percent). Officers in many parts of the country wear Dehner boots including approximately 80 percent of the California Highway Patrol, Ketzler said (J. Ketzler, 1992). The Dehner boots that went the farthest were the 100 or so pairs ordered by the National Aeronautics and Space Administration for its shuttle astronauts to wear in space. NASA still uses the wide-bottomed, black boots for training exercises (D. Ketzler, 1992).

4.5 Another Move

In 1983, the Federal government purchased four square blocks around 20th and Farnam including the Dehner company building for construction of a new Federal Reserve Bank.

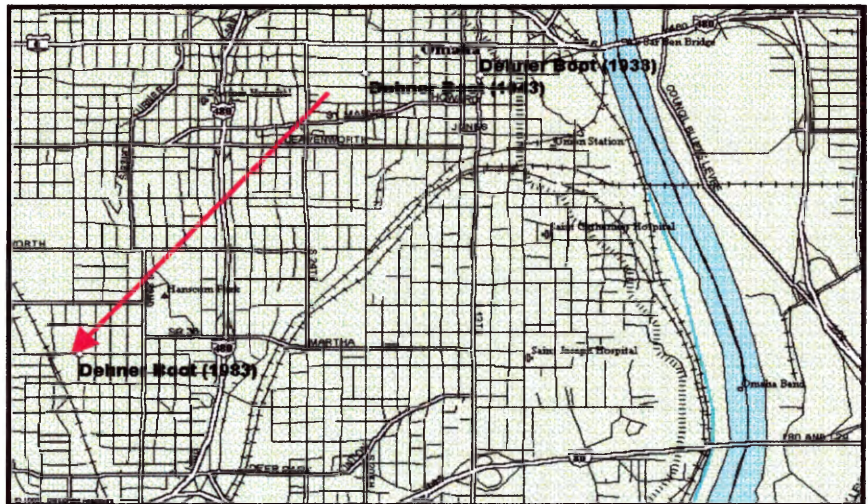


Figure 17. Move to Dehner's current location.

The Dehner Company therefore moved to 3614 Martha Street (Figure 17). According to Jeff Ketzler, the current building was not their first choice. However, the other facilities and locations they considered did not meet his requirements of:

- a. Close to downtown
- b. High ceilings

c. Inexpensive

When asked why the requirement to stay near downtown when other companies are escaping the old central business district; he replied, "I grew up in that area and prefer to stay close to it" (J. Ketzler, 1992). The present building contains approximately 20,000 square feet on a lot that has plenty of parking for customers who often bring their horse trailers with them as they stop at Dehner to pickup or order new boots.

In the end, Dehner discovered as many other small businesses have during their relocation, that the price per square foot is much cheaper for a "middle-aged" building, compared to construction costs for a new suburban plant. The firm is well adapted to the new location; there is ample room for expansion with the building; and the central-city location is advantageous from the standpoint of labor supply, transportation, and availability of services.

4.6 LABOR

Manufacturing of footwear is still a labor-intensive process, requiring several skilled workers. These skills are not readily available in the current labor market, as it takes approximately six years to become proficient in

the art of boot making. And since a vast majority of footwear manufacturing is accomplished overseas, the art of boot making is lost in the United States, except to a remaining few. The Dehner labor force is made up of 34 employees that has been with the company for numerous years. Frank Thompson, the master boot maker for Dehner, had been with the company for some seventy years until he passed away in 1997 while still working at the company doing what he loved best. When asked why he didn't retire, "Mr. Thompson's stated, if he wasn't making boots with Dehner, he would be out looking for something else to do, so might as well stay with the company (Kelly, 1995)." The entire work force resides within the western portion of the Omaha City limits. This is considered good for the company as it cuts overhead costs for workers commuting to and from work for long commutes tend to drive up wages, as workers must offset cost of fuel, oil, and vehicle wear. The other reason for staying with the company is pride, pride in their workmanship and in their company's line of products.

4.7 PRODUCTION LINES

In 1957 the decline of the U.S. footwear manufactur-

ing commenced after a record production of 591,757,000 pairs of pairs of shoes. Over the years the demand for high quality boots (Figure 18) declined as they went out of style and with the introduction of the differ-

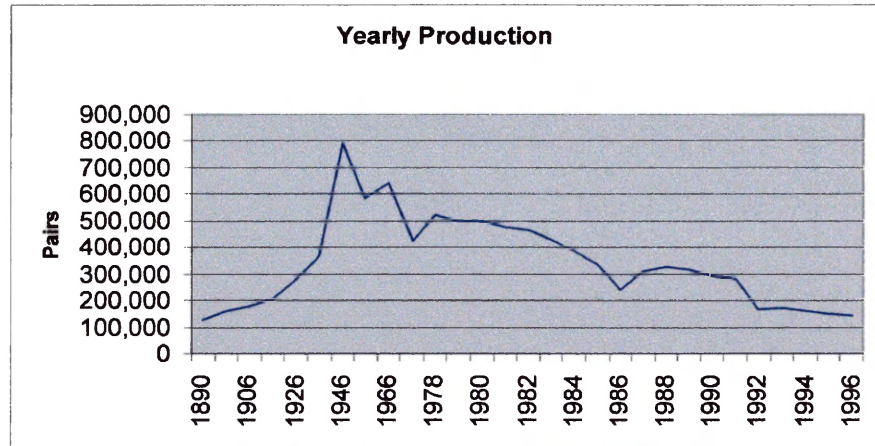


Figure 18. Source: U.S. Census of Manufactures, 1880-1996.

ent line of shoes, particularly the tennis shoe, and the



Catalog Cover From 1912, Depicting Teitzel Boot Company's Product Line

movement of the shoe production to overseas location due to cheaper labor. So the Dehner Company was forced to cease or reduce production on several lines. As the desire and need for custom made shoes and boots declined (partially

due to the decline of interest in horses), Dehner Company was forced into finding alternate markets to keep the company alive. After much deliberation among the company managers, it was decided, the company would concentrate

on small markets, unprofitable for the larger companies. That decision eventually paid off as the demand for quality boots rose with the introduction of the motorcycle law enforcement agencies and with the comeback of Dressage (English style) riding in the equestrian world.



Figure 19

Figure 20

Today the company concentrates on the production of high quality riding boots for both the law enforcement market (Figure 20) and the equestrian world (Figure 19).

The average retail cost of a

custom made pair of boots is \$500.00. The cost of producing the riding boot is approximately \$250.00, with a breakdown of 60%

for raw material and 40% for labor costs.

Each pair takes approximately three weeks to make on the assembly line. Most of the time is required for

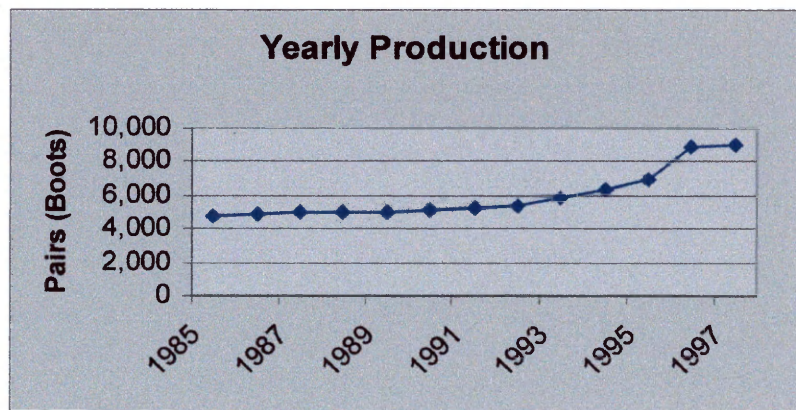


Figure 21. Yearly Production

drying the glue solvents or the final shrinking process. Today the company continues to support these two niche markets, as they are profitable for the company and require little if any retooling for new production lines. This production is triple (Figure 21) compared to others like the Vogel Company of New York City, who competes with Dehner for the same markets on the East and West Coast. The vast difference in production is mainly due to the craftsmanship and quality of the boot that is produced by Dehner (Figure 22), which is unmatched by any company in the United States.



Figure 22. Product Lines

Sources of raw material remain in the overseas areas of France, Spain, Italy, and now from South America. The actual percentage of leather acquired from each country obtained from review of the order forms over the past years indicate approximately 40 percent from Italy, 30 percent from France, 25 percent from Spain and 5 percent from South America. But Jeff Ketzler did indicate, "raw material is dependent on the availability of the tanneries' operating season." According to Jeff Ketzler the tanneries in France close in

August; Spanish tanneries close in November; and Italian tanneries close in the February to March time frame (J. Ketzler, 1992). Thus, the time of the year determines the source of leather. They consider the best leather to be yearling calf hide from Italy.

From each calf hide an average one to one and one half pair of boots is produced. The cutters (Figure 23) have to watch for flaws in the hide and the fat



Figure 23. Leather Cutter

wrinkles that develop as the calf grows. From the older cattle the hide is much thicker and is usually split in half along the backbone. Yearly average cost of leather for raw material is approximately \$750,000 as the company averages between 7,000 and 8,000 hides per year depending on the quality of the hides. The leather is transported by ship from overseas to Newark, New Jersey, and then trucked to Omaha. Domestic raw material consists only of the manmade sole for the boot, acquired from a manufacturer in Milwaukee, Wisconsin, and the inner boot lining is purchased from various tanneries throughout the United States.

4.8 MARKETS

The general importance of access to the market as a factor affecting industrial location has been recognized for years. There is evidence that for many industries the significance of the market is growing in relation to such considerations as the cost of labor and materials. Freed from the original necessity of being on a coal field or other source of power or raw material, many firms now show a distinct preference for a location in or near one of the major metropolitan regions, such as the Northeastern Megalopolis of the United States. There is the general tendency for industry to pay more attention to the market and its manipulation than was the case in earlier stages of industrial development (Smith, 1971). At one time goods were produced to satisfy a known demand, this being the classical response of the entrepreneur in the free market, but today it is often the case that a market is created by advertising without which effective demand for the product would not exist. The amount of expenditure on sales promotion necessary to generate and sustain demand for a new product, together with the large initial capital investment involved in most new industrial enterprises of this kind, makes the

achievement of large volume of sales of critical importance. Such a market may be easier found and more efficiently served in some locations than in others. As Chisholm (1966) has remarked, "To maximize profits in an imperfectly competitive world, easy access to a large market may permit scale economies to more than offset the cost of assembling and processing materials."

For any product the volume of sales and the price obtainable, as reflected in the consumers demand curve, may be subject to geographical variations. Demand will obviously vary from place to place according to the nature of the product and the number, type, and distribution of potential customers. For some products a location in an area

of relatively high per capita income or purchasing power may be an advantage; while for other industries the main thing is to have a

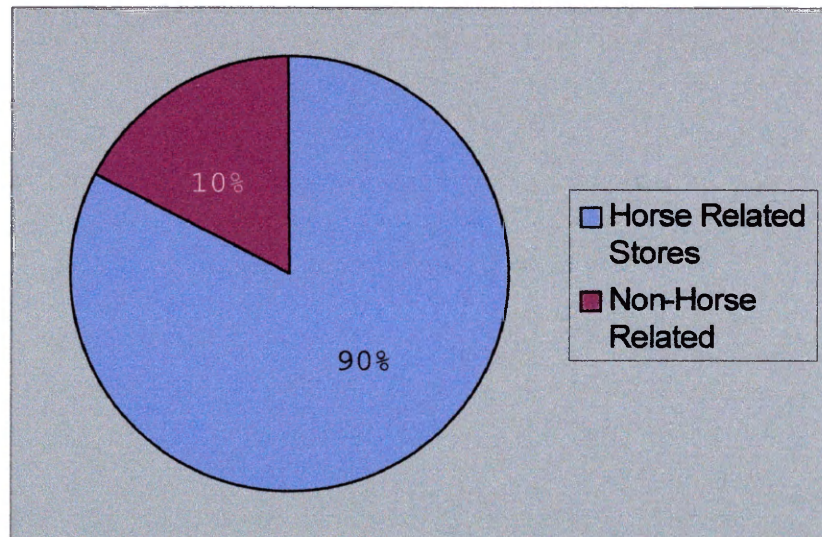


Figure 24. Percentage of dealers broke down according to service.
Source: Dehner's Internet Site (<http://www.Dehner.com>)

secure local market with a steady and predictable demand (Hecock and Rooney, 1968).

The nature of the market and its geographical distribution can thus affect a manufacturer's profits both through his costs and through the price he can obtain for his product. Consequently the overall influence of the market in relation to other factors which have a bearing on locational choice in any specific situation is often very hard to evaluate precisely (Smith, 1971). For the Dehner Boot Company, the riding boot market makes up 90 percent of the company's business, producing an average yearly income of two million dollars (Figure 24). The company no longer produces for the general public, catering mostly now to the elite. With the high cost of the boots, the average person either would not or could not afford them. In 1992, the company distributed 90 percent of its boots domestically and the remaining 10 percent shipped to various locations around the world (J. Ketzler, 1992). An investigation of the company's list of dealers produces a concentration model of distribution (Appendix 1 and 2).

Location of a dealership (see appendix 4) is in no way indicative of the amount of sales for each individual

state. As each state may represent various requirements for the product manufactured by The Dehner Company. As in the state of California, a large number of dealers reside there due to the demands in the law enforcement area and in that it is a culture center for Dressage style equestrian riding. Overseas dealers (Figure 25) represent mainly equestrian sales with the exception of the Netherlands, where the boots are worn by the prostitutes to appeal to the customers in the Red Light district of Amsterdam.

Another way in which the market influences plant location

is

through

its

effect on

costs.

Finished

products

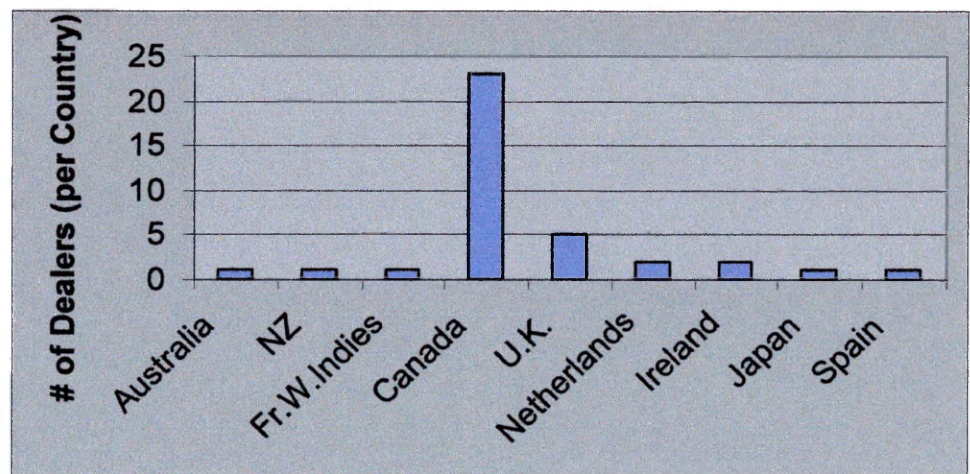


Figure 25. Overseas Dealer Breakdown. (Source: <http://www.Dehner.com>)

must be transported to the consumer, and in many industries the outgoing freight bill can be a substantial addition to the cost incurred in acquiring the necessary inputs and conducting the process of manufacturing.

Proximity to the market if it is spatially concentrated, or a central location if customers are dispersed, can thus be an advantage and, to some firms, a necessity (Smith, 1971).

But the transport cost involved in distributing the product to the consumer is not the only item of expenditure involved in marketing. In some industries, large sums of money are spent on advertising and other forms of sales promotion, and although this is not generally a spatially variable cost item there are circumstances where it may be related to the choice of location. For example, more advertising may be needed in a highly competitive market than in one where the firm has a monopoly. And because of existing habits or preferences people in some areas may need more persuasion as to the virtues of a new product than they might in other areas (Smith, 1971).

The nature of the market and its geographical distribution can thus affect a manufacturer's profits both through his costs and through the price he can obtain for his product. Consequently the overall influence of the market in relation to other factors which have a bearing

on locational choice in any specific situation is often very hard to evaluate precisely.

Unlike in the past when the industrial revolution began in America, goods had to be moved slowly and laboriously along very poor roads, unless natural waterways existed. The canal era improved the situation, but the choice of route was still severely restricted and unless a manufacturer could obtain a site beside the waterway or at the terminal he had the problem of transshipment and the use of roads for part of the journey. The introduction of railroads not only improved the speed and reliability of overland transportation but also led to the creation of a much more flexible spatial system of movement. There was also, in the course of time, a greater possibility for a manufacturer to site his plant with direct access to the rail route than was the case with the canals. Increasing use of road transportation, made possible by the internal combustion engine and construction of modern highway systems, have taken this flexibility a stage further. This flexibility gave practically every factory the opportunity for direct access to customers and sources of material without the necessity for transshipment from one transportation means to another en

route. The more efficient transportation became, as measured by decreasing costs of overcoming distance, the more freedom the manufacturer had to locate his plant with regard to criteria other than freight costs (Smith, 1971).

Today, Dehner utilizes the truck and airline industry extensively to move their raw material and finished products. Raw material is shipped from suppliers to ports on the East Coast and trucked to the company in Omaha, Nebraska. Finished products are shipped using United Parcel System (UPS), Rapid Package System (RPS), truck freight lines which utilize the extensive road network through Omaha, and the air express services (i.e. UPS and Federal Express) to deliver quick overnight service. These improvements in transportation and communications have allowed Dehner to adapt to each of its new locations by allowing the company to reach out and deliver the products to the markets. It is apparent throughout this chapter, Dehner did not locate in the optimum industrial location, either near the source of raw material or primary markets. But instead settled where it could afford to (as in the cost of Wichita) or where space was available (during the 1930s in Omaha,

Nebraska). Or as in the case of the last move, the desires of the president of the company wanting to stay in Omaha, Nebraska, and not move nearer to the primary market of California or going to where labor may have been cheaper (overseas).

What are apparent in this chapter are the processes that face each company everyday when dealing with the future of the markets, labor, cost of production, and raw materials. The company leaders must make the difficult decisions on where to locate, while at the same time, city planners must learn the intricate aspects that attract these companies to the communities, so as to appeal to them and have them settle in their area.

Chapter 5

SUMMARY AND CONCLUSION

This study has examined why does a firm or company settle or remain in a particular area even though it is not the prime location in relation to its markets or raw material. An investigation of any industry reveals cases of plant locations that cannot be explained by obvious economic factors. The choice of one site over possible alternatives might seem to be entirely a matter of chance, with historical accident or the personal whim of the entrepreneur as the only possible explanations.

Three main points were examined to explain the choice of one site over possible others:

- 1) Historical accident
- 2) Personal factor
- 3) Profitability
- 4) Flexibility and Adaptability

Point One

The term historical accident in this context covers a number of random factors, as in the case of Dehner, at least in part. Some places have a particular industry by virtue of the accident of birth of the founder of a business or the invention of some kind of revolutionary

process or machinery, which may lead to the growth of an industry in a particular city. Industrial concentrations that owe their origin partly to local ingenuity of this kind are quite common in the older industrial districts of Western Europe and in the U.S. Manufacturing Belt. Other important industries can be explained by their founders settling in a particular place simply because they liked the look of it, and then building up a business there which could have been equally successful in a number of other locations. The random factor in the diffusion of industrial innovation can also have a bearing on the spatial pattern of the adoption of new techniques, with some places and some entrepreneurs being more receptive to change than others (Smith, 1971).

Point Two

The person who sets up his factory in a particular place because it is close to a good golf course is a celebrated figure in the literature of industrial location. The number of decisions that have really been influenced by this specific consideration is questionable, but there is a mass of empirical evidence that such matters do enter into the decision making process at some stage, and that for many plants they may determine the

precise choice of locations. The personal reasons included proximity to home and family, personal attachment to the area, and important contacts. Malinowski and Kinnard concluded that personal factors certainly play a role in the specific locational decisions, but as a secondary factor; 45 percent of executives mentioned them, but only 16 percent put them among the most important reasons (Malinowski and Kinnard, 1961). However, Chapman and Wells found personal reasons cited by eleven of the forty-nine firms were factors influencing the choice of a particular city as a location (Chapman and Wells, 1958). While, Katona and Morgan found that 51 percent of the industrial plants in the State of Michigan is attributed to being the home state of the founder (Katona and Morgan, 1950). Overall, personal factors ranked fourth behind the market, transportation facilities, and labor.

Point Three

Within the amount of material available, it would now be prudent to say that a definite pattern emerged as to the niche markets that Dehner serves. The clientele list indicates that customer distribution points range from uniform sale shops in the west to specialty shops in

Amsterdam, The Netherlands. It is clear, that several factors drove the choice of locations for the Dehner Company. At first, a location to practice a trade and earn a living was the driving force. The availability of raw material and readily developed markets was a bonus that came with the location near Fort Riley, Kansas. As the popularity of the original Teitzel boot spread the need to expand for greater production and to satisfy growing markets took over, the company's necessity for greater production space as well as requirements to stay near to their established markets was paramount. Thus came the move south to Wichita.

By the 1930's, the company was back almost to square one when it split. It needed expensive space to setup shop and practice a trade. It still had its established markets, and sources of raw material but no facility to produce a product. The move to Omaha accomplished other things than to just move the company. It opened up new markets at Fort Omaha and Fort Crook Army Posts as well as bringing new, ready sources of raw materials from the tanneries in South Omaha.

Point Four

Although over the years the source of quality raw materials slowly dwindled, the company remained flexible to change with the times. Not all changes were negative. With every changing aspect in transportation methods, Dehener altered the way to satisfy its markets. By utilizing Federal Express, the Rapid Package Service, and United Parcel Service it has given the company an ability to delivery in quicker time and reduce transportation costs, which increased profits.

The Dehner Boot Company has proved adaptation is plausible, when companies are forced into a new situation. Adjusting to changing economic and geographic environments allows companies to meet needs of the local and regional markets while still meeting the necessary profit margins of the company. Firms, like Dehner can adapt to new facilities, even when they are not ideal for the production process of the company. Most of all the Dehner Company has shown that small operations can indeed adapt to the ever changing market; not by conglomeration but through niche marketing. By focusing on a small market segment not profitable by the large corporation, Dehner survived and thrived by being managed correctly

and aggressively, and with the support of the surrounding community.

As an individual comment, while engaged in conversation about the American industry, it was observed that we (the American public) are in love with the large corporation; while it is usually the small businesses that provide the base for the countries economic growth. It appears that cities or at least civic leaders are intrigued with having large corporation in their communities, because they look good and carry prestige with their presence.

But, what happens when they close their doors and move? You have a large unemployed labor force, seeking jobs in an already crowded economy. Additionally, the community has a large facility that no one wants or can use due to its massive size. A facility not paying taxes; not producing a product; and not to mention the unsightly appearance from the lack of upkeep.

Which is better for the community, continually seeking of potential large firms (i.e. Micron, or Mercedes Benz) to build an industrial sector around; or, to seek several small companies with a tax base of X amount of dollars equal to or greater than the large corpora-

tion. If ten or twenty percent of the small businesses close, the community still benefits from the remaining firms, and is not stuck with an unusable facility.

Adaptability is key to the success of the small companies that spring up across America. Adapt the product line to the niches no longer being filled by the large corporation (due to lower profit margins; while, at the same time adapting to the location provided to the company by chance). Many companies cannot or have not located at the optimal location, due to financial constraints or competition overload. But to adapt or adopt to the changing environment can indeed keep them in business in a positive way.

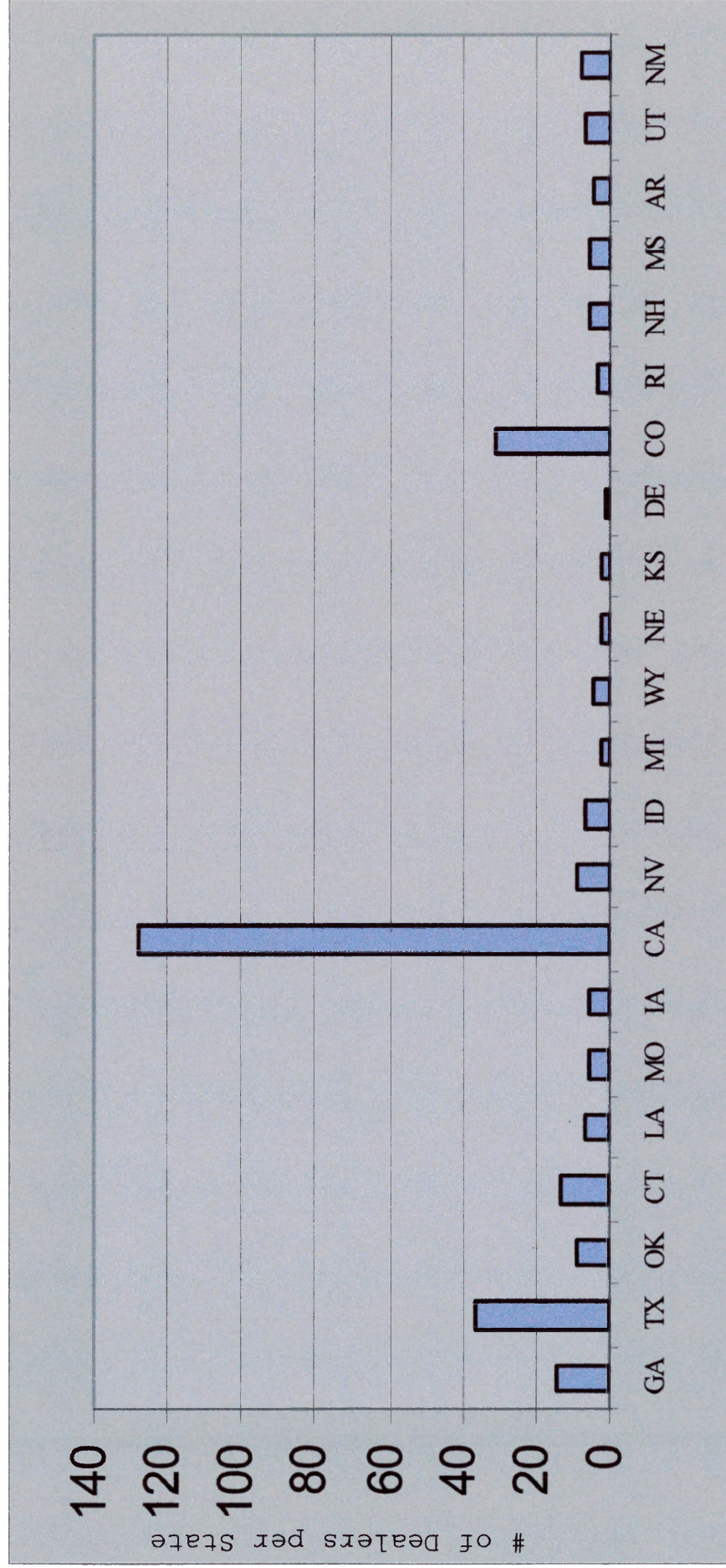
The overall objective of using a market segmentation strategy is to improve the company's competitive position. More specific include increased sales, improved market share, and enhanced image/reputation. This not to say that it is impossible to accomplish these goals using mass marketing tactics. But, by focusing in on areas that the firm can best serve, it is possible to prosper. Aggregation is the shotgun approach to marketing, while segmentation is the high-powered rifle (Weinstein, 1987). Segmentation thus improves management's understanding of

the customer, and more importantly, why the customer buys. Once management understands consumer needs it is in a much better position to direct marketing programs that adapts to satisfy the needs of the customer. management is also better able to assess competitive strengths and weakness so it can focus its attention.

Dehner accomplished this by adapting to the ever-changing markets by narrowing its product line to meet the needs of a segment of demand in the country during war and peace. The firm adapted to its new facilities provided in Omaha, Nebraska, by chance, and locally, by design. As the final decision in many cases, do not forget the personal preference of the individual running the company. If he loves to sail, do not landlock the company.

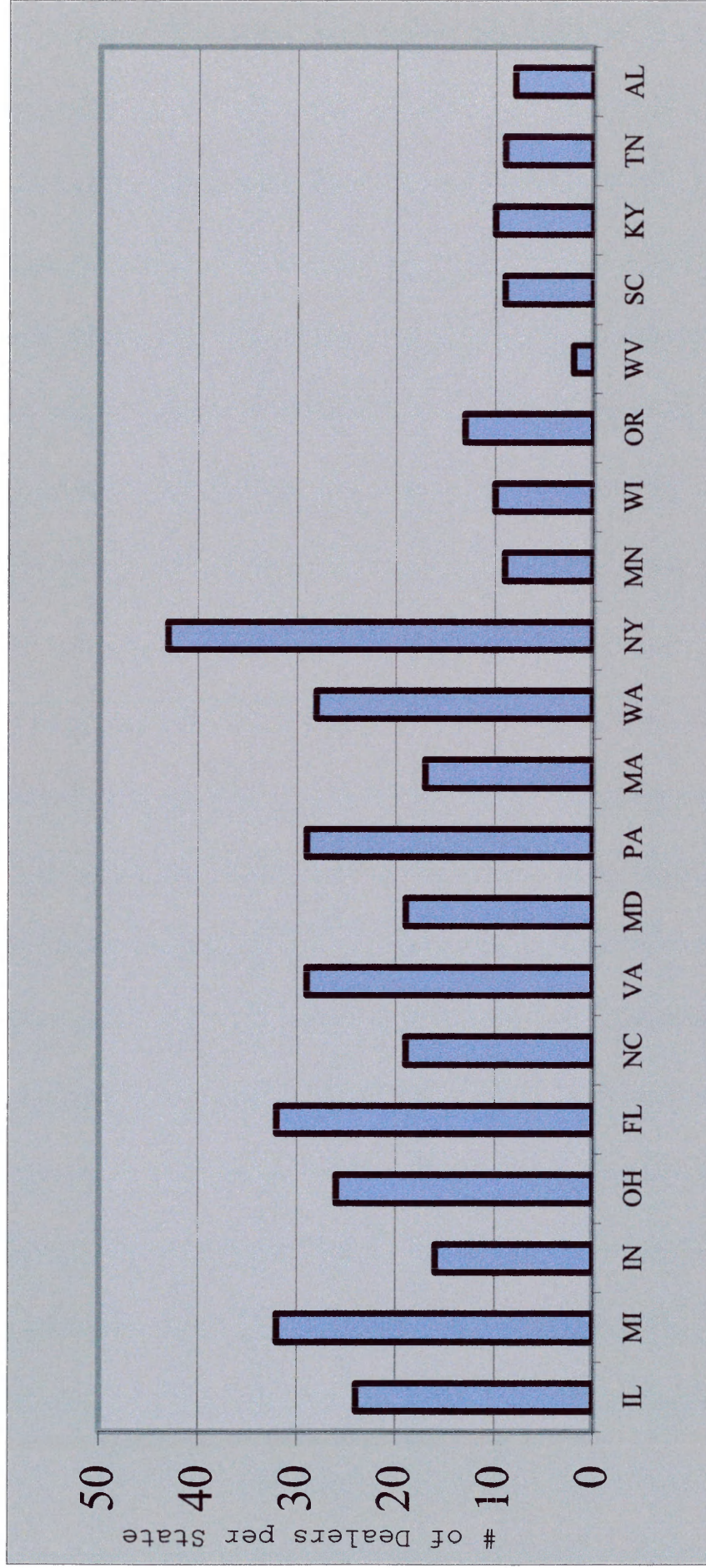
Thus, Dehner Boot of Omaha, Nebraska, found through a conscious decision that the firm could operate in a business market that had essentially "gone overseas." In addition, this study of Dehner provides ample evidence that traditional location theory is not enough of an answer, but segmentation and/or niche theory is. Further studies of well-known, small manufacturers need to be accomplished to add to this body of knowledge.

APPENDIX 1. NUMBER OF DEALERS PER STATE



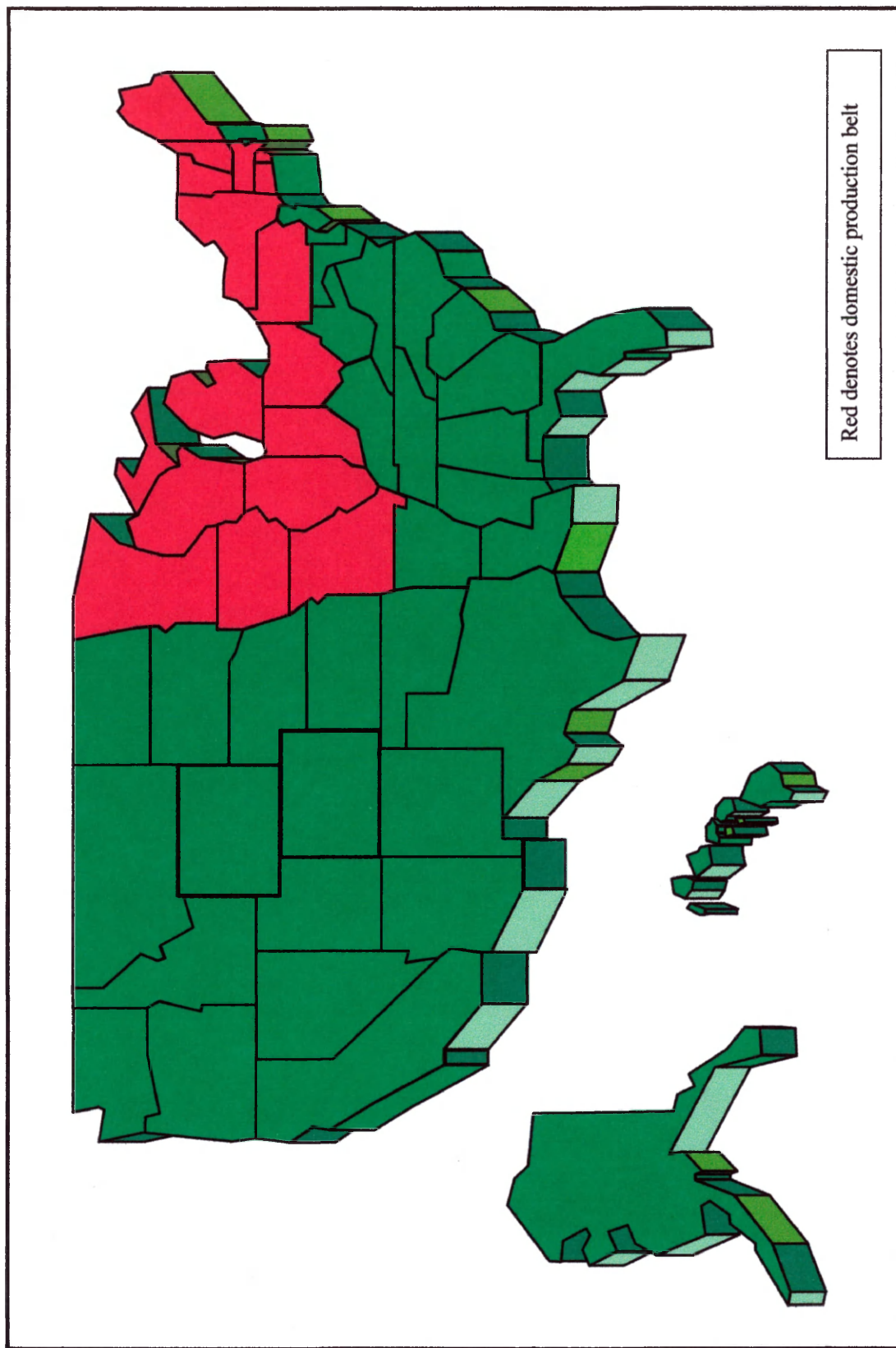
(Source: List of Dealers From <http://www.Dehner.com>)

APPENDIX 2. NUMBER OF DEALERS PER STATE



Source: List of Dealers From <http://www.Dehner.com>

Appendix 3. Location of Domestic Shoe and Boot Production



Source: Alexander and Gibson, 1979.

NAME	ADDRESS	CITY	STATE	PHONE
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Alabama

Carousel Tack Shoppe	5090 Cahaba Valley Rd	Birmingham	AL	334/991-0007
Flint Ridge Farm	3616 Maysville Rd NE	Huntsville	AL	334/776-3635
Fox Run Tack Shop	6775 Country Rd 32	Point Clear	AL	334/928-0394
Massey's Corral Inc.	24221 Second Ave N	Birmingham	AL	334/323-6969
Strother's Tack and Gifts	9502 Vaughn Rd	Pike Road	AL	334/409-0506
Tack 'N Togs	100 Schillinger Rd N	Mobile	AL	334/633-0990
The Shoe Doctor	451 N Daleville Ave	Daleville	AL	334/598-9251
The Tack Shop	1100 Schillger Rd S	Mobile	AL	334/633-0990

Arkansas

Berry's Tack & Riding Apparel	269 Millwood Cir	Maumelle	AR	501/851-0440
Horsefeathers Inc	27 Stoneledge Dr	Maumelle	AR	501/851-1979
Schneider's	405 Main St	North Little Rock	AR	501/374-1823
The Tack Room Inc	17 Lakeshore Dr	Conway	AR	

California

A. V. Uniforms	2930 N Blackstone Ave	Fresno	CA	209/224-1199
Ace Uniforms & Accessories	748 6th Ave	San Diego	CA	619/233-0227
Alan's Uniforms	1906 Oceanside Blvd Ste Q	Oceanside	CA	619/757-0092
And the Whole Bit	26046 Bouquet Canyon Rd	Santa Clarita	CA	805/255-6713
Becnel Uniforms	224 E 6th St	Los Angeles	CA	213/623-4522

Benstrom Saddlery	1542 Encinitas Bld	Encinitas	CA	619/436-0606
Big Black Boots	7122 Cather St	San Diego	CA	619/298-1973
Birchwood Saddlery	2230 Fairview Rd	Costa Mesa	CA	714/646-1163
Bootworld Inc.	7580 Trade St	San Diego	CA	619/695-9040
Bottomley Farm Saddlery	1131 Bear Creek Rd	Martinez	CA	510/228-3786
Brenda's Tack Room	414 Main St	Woodland	CA	916/666/1900
Bricker-Mincolla #1	600 E 14th St	Oakland	CA	510/465-7754
Bricker-Mincolla #2	611 Jefferson Ave	Redwood	CA	415/369-0727
Broken Horn Inc.	1026 Leorita st	Baldwin Park	CA	818/337-4088
Buckeye Saddle Shop	7638 N Meridian Rd	Vacaville	CA	916/678-3512
Butler Uniforms	5600 H St	Sacramento	CA	916/455-2654
Butler's Uniforms	345 9th St	San Francisco	CA	415/863-8119
Cabaline Saddle Shop	11313 State Rt 1 Box 398	Point Reyes Station	CA	415/663-8303
Calabasas Saddlery Inc	23998 Craftsman Rd	Calabasas	CA	818/591-0292
Caleb V. Smith USA	1375 Mission St	San Francisco	CA	415/861-4824
Cal-Tack	2600 S Delawar St	San Mateo	CA	415/349-3722
Camelot's Tack Shop	349 Stagecoach Rd	Trinidad	CA	707/677-0604
Campbell & Campbell Inc.	2708 Willow Pass rd	Concord	CA	
Cardwell's Uniforms	511 Marina Ctr	Suisun City	CA	707/422-5567
Carman's Uniforms	2202 West Artesia Blvd. Unit 7	Torrance	CA	
Carousel Saddlery	884 Portola Rd	Portola Valley	CA	415/851-7330

Carriage Saddlery	1584 Newport Blvd	Costa Mesa	CA	714/548-2809
Caspian Farms Saddlery	418 Mendocino Ave	Santa Rosa	CA	707/575-3847
Centerline Tack Shop	9264 Orangevale Ave	Orangevale	CA	916/989-5823
Central Valley Uniforms	332 Pollasky Ave	Clovis	CA	209/299-6597
Christensen's	1471 S De Anza Blvd	Cupertino	CA	408/255-3761
Christensen's	3690 Taylor Rd	Loomis	CA	916/652-4592
Classical Horseman	415 E Branch St	Arroyo Grande	CA	805/473-0445
Clayton Saddlery	6200 Center St	Clayton	CA	510/672-6100
Code Four	1275 S Sant Fe Ave # 14	Vista	CA	619/724-9481
Creekside Farm & Tack	17701 Marsh Creek rd	Brewood	CA	510/634-7028
Custom Choice	416 E D St	Petaluma	CA	707/763-2532
D & L Saddle & Trailers	7269 E Bullard Ave	Clovis	CA	209/299-8137
Diamond W	201 Main St	Chico	CA	916/891-1659
Dick Bruhn Inc.	300 Main St	Salinas	CA	408/758-4684
Discount Saddlery	25 Quinta Ct	Sacramento	CA	916/689-9079
Dominion Saddlery	480 W Riverside Dr	Burbank	CA	818/842-4300
El Toro Tack & Feed	22731 Aspan St	Lake Forest	CA	714/770-2291
Enerie Equestrian Supply	3344 Coach Ln	Cameron Park	CA	916/676-7433
Equitack Inc.	137789 Campo Rd	Jamul	CA	800/677-9946
Equitex	92 Canyon Oak Dr	San Rafael	CA	415/492-9851
European Equestrian Supple	528 Palisades Drive	Santa Monica	CA	310/393-8636
Everything English Saddlery	25703 Road 95	Davis	CA	916/756-3333

Fashion Uniforms Inc.	2298 Mission St	San Francisco	CA	415/861-7165
Flintridge Riding Club	4625 Oak Grove Dr	Flintridge	CA	
Foothill Saddlery	11355-C Foothill Blvd	Lakeview Terrance	CA	818/834-8228
G.B. Equestrian Supply	3555 Taylor Rd	Loomis	CA	916/652-6433
General Feed & Seed Tack Shop	1900 Commercial Way # B	Santa Cruz	CA	408/476-5344
Greenwood's Uniforms	115 S E St	San Bernardino	CA	908/855-0755
Halbert Tack & Clothing Co Inc.	4568 Mission Gorge Pl Suite H	San Diego	CA	619/584-2986
Hudson & Company	3740 The Barnyard	Carmel	CA	408/625-222
Inland Uniforms	2225 Kansas Ave	Riverside	CA	909/781-6366
Jackson Hole Horse Emporium	50959 Madison St	Indio	CA	619/342-2212
Jake's Place	918 Cottonwood Ct	Petaluma	CA	707/763-2532
Jedlicka Saddlery Inc.	2605 De La Vina St	Santa Barbara	CA	805/687-0747
Kenners' Uniform & Supply	1601 2nd St # A	Escalon	CA	209/838-3760
Kensington Place	2350 San Gabriel Canyon Rd	Azusa	CA	818/815-9967
Keystone Uniforms	221 N Citrus Ave	Covina	CA	818/915-1936
L. C. Action Police Supply	1088 N 1st St	San Jose	CA	408/294-2677
Lemos Ranch & Tack Shop	2527 Los Berros Rd	Arroyo Grande	CA	805/489-9243
Lewis Police Equipment Co	1321 W Sunset Blvd	Los Angeles	CA	213/350-2813
Long Beach Uniform	2789 N Long Beach Blvd	Long Beach	CA	310/424-0220
Los Osos Valley Equine Farm	1869 Los Osos Valley rd	Los Osos	CA	805/528-0559

Louis The Tailor #2	2123 W 182nd St	Torrance	CA	310/329-4585
Marin Tack & Tack	1599 Sir Francis Drake Blvd	Fairfax	CA	415/456-2929
Mary's Tack Shop	3675 Via De La Valle	Del Mar	CA	619/755-2015
MK's Country Life	225 Cannery row # C	Monterey	CA	408/646-5114
Mr S Leather Co Inc.	310 7th St	San Francisco	CA	415/863-7764
Oakland Riding Academy & Tack Shop	5745 Redwood Rd	Oakland	CA	510/531-0262
Offutt's English Tack & Wear	9585 Main Street	Penngrove	CA	707/795-3333
Olsen Nolte Saddle Shop	1580 El Camino Real	San Carlos	CA	415/591-4403
Outdoor Outfitters	810 s Yorba St	Orange	CA	714/639-8565
Pet Club Warehouse	1901 Camino ramon suite E	Danville	CA	510/866-7291
Pony Express	3605 Sagunto St	Santa Ynez	CA	805/688-3624
Professional Policy Supple Inc.	722 Clay St	Oakland	CA	510/839-6505
Rainey Saddlery	4325 E Tulare Ave	Fresno	CA	209/252-8225
Roberts & Webley	209 Post St Ste 1103	San Francisco	CA	415/391-7474
Rockpoint Supply Company	10142 Canoga	Chatsworth	CA	818/341-0135
Ron Richards Inc.	2510 Telegraph Ave	Oakland	CA	510/893-3028
Saba's mens wear	915 Baker St	Bakersfield	CA	805/323-7834
Sacramento Saddlery	2920 Auburn Blvd	Sacramento	CA	916/489-6678
Sam Cook Uniforms	2727 S Flower St	Los Angeles	CA	213/748-4800
San Dimas Equestrian Center Tack Store	299 E Foothill Blvd	San Dimas	CA	714/599-2494

Santa Ana Feed & Saddlery	1421 E 1st St	Santa Ana	CA	714/547-3973
Santa Rosa Saddlery	5338 Hwy. 12 West	Santa Rosa	CA	707/527-8225
Scotts Valley Feed	5470 Scotts Valley Dr	Scotts Valley	CA	408/438-3194
Set in the West	318 Clovis Ave	Clovis	CA	209/322-9378
Sierra Saddlery	40368 N State Highway 41	Oakhurst	CA	209/642-6266
Sierra Saddlery	11333 Deerfield Dr	Truckee	CA	916/587-3349
Sport Horse New Zealand	160 Oak Dr	San Rafael	CA	415/457-6169
Stompers Boots International	323 Tenth St	San Francisco	CA	415/255-6422
Stuart-Stevenson's Equestrian Supply	3212 Thousand Oaks Blvd	Westlake Villa	CA	805/494-1934
Summit Uniform Corp	545 Meridian Ave # A	San Jose	CA	408/293-8633
Tal-A-Tara Saddlery	6439 California St	San Francisco	CA	415/751-9275
The Arena	3219 Becjelli Ln	Redding	CA	916/223-1930
The Equestrian	45 Peninsula Ctr	Rolling Hills Estates	CA	310/377-6844
The Light Horse	383 Olympia Rd	San Juan Bautista	CA	408/623-2126
The Mobile Store	9624 Orangevale Ave	Orangevale	CA	916/989-5823
The Paddock Shop Inc	701 S Victory Blvd	Burbank	CA	818/843-8541
The Tack Box	120 w Bonita Ave Ste D1	San Dimas	CA	714/599-6803
The Tack Box	Highway 46 & Golden Hill Rd	Paso Robles	CA	805/238-5491
The Tack Outlet	11169 E Service Rd	Denair	CA	209/668-3537

The Tack Room	5437 McHenry Ave	Modesto	CA	209/526-6650
The Tack Taxi	1142 N San Marcos Rd	Santa Barbara	CA	805/565-4988
The Tiedown	239 State St	Los Altos	CA	415/948-1719
The Wharf	980 E Front St	Ventura	CA	805/648-5037
Three L Tack & Saddlery	5525 Mission Rd # B	Bonsall	CA	619/945-2270
Uniform Center	1249 Katella Ave	Orange	CA	714/633-3880
Uniform Express	496 N Garfield Ave	Montebello	CA	213/838-8073
Uniform Shoppe Inc.	134 S K St	Tulare	CA	209/685-1977
Uniforms Etc Inc.	3530 E Main St	Ventura	CA	805/642-3707
Uniforms Inc.	2889 Olympic Blvd	Los Angeles	CA	213/383/1395
Uniforms Inc.	3755 Park Blvd	San Diego	CA	619/298-7504
Uniforms Inc.	2025 N Main St	Santa Ana	CA	714/541-3546
Uniforms Inc.	8146 Van Nuys Blvd	Panorama City	CA	818/785-0477
Vip Uniforms	2107 Brundage Ln	Bakersfield	CA	805/323-1659
Wearhouse Uniforms	3734 San Fernando Rd # A	Glendale	CA	818/243-4440
Wearhouse Uniforms	13248 Hawthorne Blvd	Hawthorne	CA	310/676-9180
Whitehorse Tack & Vet Supply	98 S Main St # B	Templeton	CA	805/434-1711
Winners Circle Saddlery	740 Bethel Road	Templeton	CA	805/434-2140
Woodward Boots	1347 Tavern Rd # 31 A	Alpine	CA	619/445-8681
Yorkshire Uniforms	2626 Broadway St	Redwood City	CA	415/366-7834

Colorado

Bits & Pieces	1250 Bergen Pky	Evergreen	CO	970/674-9646
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Cedar Ridge Tack Store	3059 103 Rd	Carbondale	CO	970/963-3507
Circle C Saddlery	875 Carr St	Lakewood	CO	970/238-5513
Crystal Springs Saddlery	1609 112th Rd	Carbondale	CO	303/963-1022
Equine Outfitters Inc.	15 S Wilcox St	Castle Rock	CO	970/660-1414
Equus Boutique	3620 N Taft Hill Rd	Fort Collins	CO	970/493-2640
Equusport	20025 Capella Dr	Monument	CO	719/481-4200
Flying Colors Horse Supply Inc.	0057 Edwards Access Rd	Edwards	CO	970/926-4303
Franktown Feed & Ranch Supply	2129 No. State Hwy	Franktown	CO	970/688-3062
Galerie Leon	19 E Bayaud Ave	Denver	CO	970/733-5778
Happy Horse Tack & Saddle Shop	113 Peterson St	Fort Collins	CO	970/484-4199
Horse and Hound Inc	5958 S Holly St	Englewood	CO	970/694-0411
Joy Riders Equine Supply	9729 W Coal Mine Ave	Littleton	CO	303/973-7080
K Bar K Tack' Em Up	1663 US Hwy. 50	Grand Junction	CO	970/245-2355
L & S distributing Co Inc.	2827 E Platte Ave	Colorado Springs	CO	719/578-1113
Martin's Boot & Saddlery	2709 Iris Ave	Boulder	CO	970/442-4190
Moonhill Saddlery	42555 County Road 78	Hayden	CO	970/879-4441
Neve's Uniforms Inc.	4855 Pecos St	Denver	CO	970/455-7000
Nightwinds Tack Shop	315 Mountain Ave	Berthoud	CO	970/523-2463
Quartermaster Inc.	2897 Mapleton Ave	Boulder	CO	970-449-2488
Simon's	501 W Colorado St	Holly	CO	303/573-6961
The Corral	1711 15th St	Boulder	CO	970/443-0090
The Four Winds	2504 N Shields St	Fort collins	CO	970/482-0767

The Horse Hut	Pine Drive Box 213B	Parker	CO	970/841-3249
The Rider's Choice	327 El Paso Blvd #C	Manitou Springs	CO	719/685-4845
The Sport Horse	120 SO. City Road	Fort Collins	CO	970/493-8836
Tomack's Farrier Supply	7542 W Coal Creek Dr	Superior	CO	970/499-7542
Tuxall Uniform and Equipment Inc	525 Tejon St	Colorado Springs	CO	719/636-5134
Tuxall Uniform and Equipment Inc	5700 No. Wahington	Denver	CO	
Moon Run Ranch & Outfitters	8276 Snowmass Creek Rd	Snowmass	CO	970/923-3244
The Equestrian Market	1460 North Ave Ste 2	Grand Junction	CO	970/241-1400

Connecticut

Beval LTD	50 Pine St	New Canaan	CT	203/966-7828
Classic Collection Tack Shop	97 Providence Pike	Putnam	CT	203/928-3524
Fox Ledge Inc.	29 Daniels Rd	East Haddam	CT	203/873-8949
Glastonbury Tack Shop	2671 Main St	Glastonbury	CT	203/633-8565
Meadowbrook Saddlery	325 Amity Rd	Bethany	CT	203/393-3123
Ringside Saddlery	43 Charter Oak Rd	Oxford	CT	203/888-6370
Smith- Worthington	275 Homestead Ave	Hartford	CT	203/527-9117
The Competitive Edge Saddlery Inc.	2 West St	Newtown	CT	203/426-8003
The Right Lead Tack Shop	67 Hayward Ave	Colchester	CT	203/537-0318
The Tack Room	153 Post Rd E	Westport	CT	203/227-6272
The Wigwam Tack Shop	397 Indian Hollow Rd	Windham	CT	203/423-0531
Trapalanda Stables	402 Perrin Rd	Woodstock	CT	203/974-1064

Wilton Tack Shop	969 Danbury Rd	Wilton	CT	203/544-9375
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Delaware

Graves' Uniforms	102 Savannah Rd	Lewes	DE	302/645-7771
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Florida

A Ed Cohen Company	2464 Palm Ave	Hialeah	FL	305/888-4179
Anderson's Hardware & Feed Inc.	595 N Volusia Ave	Orange City	FL	904/775-7744
B-Bar-A	5556 Palmer Blvd	Sarasota	FL	813/371-8880
Beval Mobile Unit	14440 Pierson Rd	West Palm Beach	FL	
Carriage House At Foxmoor	2089 Avocado Dr	Daytona Beach	FL	904/255-1124
Chaslen Saddlery	4654 E State Rd 64	Bradentoon	FL	813/748-2667
Custom Riding Apparel	1212 Densmore Dr	Winter Park	FL	305/678-2472
Dungeon Leather	1508 NE 4th Ave	Fort Lauderdale	FL	305/767-8666
English Shoppe At West of Ole England	650 SE Monterey Rd	Stuart	FL	407/286-0099
Horse & Kennel Warehouse	1096 E 18th St	Jacksonville	FL	904/354-7634
McLelland Boot & Saddle Inc.	317 N Dixie Hwy	Lake Worth	FL	407/585-3266
Muller's Tack & Tog Shoppe	1790 40th Ter SW	Naples	FL	813/353-8225
Pony Express Riding Shop	1440 Ox Bottom Rd	Tallahassee	FL	904/893-2247
Quality Western Shop	1894 Drew St	Clearwater	FL	813/446-8791
Saddlery & Such	5301 10th Ave N	Greenacres	FL	407/964-2645
Snapdragon LTD	PO Box 1036	Montecello	FL	912/226-1272
Spectrum Saddle Shop	6738 N State Rd 7	Coconut Creek	FL	305/492-8877
Stockman's Harness & Saddle Shop	1820 Lee Rd	Orlando	FL	407/295-0331
Tack Room Inc.	208 S Main St	Bushnell	FL	904/793-3030

Tally Ho Tack Shop	Route 1 Box 371 B	Reddick	FL	904/591-1113
Tenney's Custom Saddlery	38443 5th Ave	Zephyrhills	FL	813/780-8016
The Equestrian Shop Etc.	126 SW 140th Ter	Newberry	FL	352/332-7003
The Livery Tack Shop	526 New Auburndale Hwy	Lakeland	FL	813/682-6021
The Riding Habit	7 W Lemon St	Beverly Hills	FL	352/746-5117
The Rusty Stirrup Inc.	1696 Park Ave	Orange Park	FL	904/269-0601
The Saddler	9324 N 56th St	Temple Terrace	Fl	813/980-0282
The Saddler of Orlando	1076 West State Road	Altamonte Springs	FL	407/682-1471
The Tack Shack	596 SE Monterey Rd	Stuart	FL	305/286-7774
The Tackeria Inc.	13889 Wellington Tree	West Palm Beach	FL	407/793-2021
Valhalla Farm Tack Shop	14872 47th Rd	Wellborn	FL	904/963-4619
Whip N Spur Catalog & Tack Shop Inc.	5055 Van Dyke Rd	Lutz	FL	813/682-6610
Windemere Tack Shop	6900 Morse Ave	Jacksonville	FL	904/771-6642
Wishful Thinking Western World Inc.	2230 NW 10th St	Ocala	FL	904/629-7676

Georgia

Atlanta Saddlery	1670-C Hwy 9 South	Alpharetta	GA	800/356-7203
Boots N Britches	1014 Augusta Rd	Thomson	GA	706/597-0756
Command/Banner #2	437 Armour Cir NE	Atlanta	GA	404/873-1777
Heels Down Tack Shop Inc.	70 Washington St	Jefferson	GA	706/367-2544
Horsetown	1231 Shallowford Rd	Marietta	GA	404/926-7346

Iron Horse Saddlery	1975 Barnett Shoals Rd	Athens	GA	706/769-4604
K. P. Miller Saddlery	3100 Old Concord Rd SE	Smyrna	GA	404/434-3029
Sauerhoefer's Gun Shop	RR2 Box 257	Sandersville	GA	912/522-6454
Tally Ho Saddlery Inc.	30 Gentry Dr	McDonough	GA	404/957-1750
The Barn Feed & Tack	4575 Forsyth Rd	Macon	GA	912/477-5975
The Classic Equestrian	2015 Lawrenceville Hwy	Decatur	GA	404/321-1953
The Equestrian Center Tack Shop	1171 Astondale Rd	Bishop	GA	706/769-4604
The Saddle Rack	4040 Lexington Rd	Athens	GA	404/369-9706
The Tack Tavern	1600 So. Main St	Alpharetta	GA	404/475-8225

Iowa

Longhorn Saddlery & Western Wear	RR2	Dubuque	IA	319/598-0116
Marigold Tack Shop	RR2	Ames	IA	515/597-2568
Nymeyer's At Tanglewood	916 Grand Ave	West Des Moines	IA	515/223-6585
S S Tack & More Inc.	3660 Water Works Pky	Des Moines	IA	515/279-7409
Tack Room Inc.	2421 Falls Ave	Waterloo	IA	319/234-3201

Idaho

Carousel Action Wear Inc.	204 N Triangle Dr	Sandpoint	ID	208/265-4747
Cop Shop Etc	7000 Overland Rd	Boise	ID	208/377-5418
Flynn's Saddle Shop	8633 W State St	Boise	ID	208/853-4095
Hunter's Creek Saddlery	629 W Sunnyside Rd	Idaho Falls	ID	208/529-4329
Nick's Shoe Store Inc.	1008 Main St	Boise	ID	208/342-9747
Red Wing Shoe Store	5212 Overland Rd	Boise	ID	
Tacky Tack Shop	RR2	Twin Falls	ID	208/733-8807

Illinois

Ann K. Hubbard Tack Mobile	123 No. Maukegan Rd	Lake Bluff	IL	630/234-7080
Barb's Travel Tack Shop	23720 W 119th St	Plainfield	IL	815/347-7750
Barrington Saddlery LTD	760 W Northwest Hwy	Barrington	IL	630/381-6015
Bit-N-Bridle Saddley	2240 Irving Park Rd	Hanover	IL	630/837-8070
Geneva Custom Saddlery	2 So. 899 Nelson Lake Rd	Batavia	IL	630/232-8825
High Meadows Farm Stables	RR2	Vienna	IL	618/658-7681
Hinsdale Tack Shop	430 75th St	Downers Grove	IL	630/960-3026
Horse N' Hound	RR1 Box 297	Carbondale	IL	618/549-6656
Horses Ofcourse	3136 36th Ave	Rock Island	IL	
Libertyville Saddle Shop	306 Peterson Rd	Libertyville	IL	630/362-0570
Paddock Creek Farms Tack Shop	6311 Mororiad	Edwardsville	IL	618/377-3007
Pool's Saddle Shop	16340 Kedvale Ave	Country Club Hills	IL	312/596-0259
Rolling Acres Saddlery	7400 West Illinios Rte 15	Belleville	IL	618/233-9100
Rowbottoms & Willoughby Co LTD	72 W Hubbard St	Chicago	IL	312/329-0660
Saddlers Row	20066 N Rand Rd	Palatine	IL	847/776-6700
Spring Hill Farm Riding School	1109 Pyott Rd	Lake In The Hills	IL	630/658-6131
Squad-Fitters Inc.	1206 Cunningham Ave	Urbana	IL	217/367-0003
Stratton Hats Inc.	3200 Randolph St	Bellwood	IL	312/544-5220
The Horse Store	RR1 Box 52	Anna	IL	618/833-3705
The Riding Habit LTD	11441 W 135th St	Orland Park	IL	312/460-3103
The Riding Store	3050 Hobson Rd	Woodridge	IL	630/515-9779

The Tack Box	5707 Dempster St	Morton Grove	IL	630/470-0064
Three Saddles Tack Shop	815 E Main St	Saint Charles	IL	630/377-3399
Weather Vane Farm	8206 Bull Valley Rd	Woodstock	IL	815/338-5754

Indiana

Fox's Lair	Highway 421	Bristol	IN	615/878-7433
Bratemans Inc	5326 Coldwater Rd	Fort Wayne	IN	219/484-8662
Dan-Hobyn Stables Inc.	704 N Matthews Rd	Greenwood	IN	317/888-7050
Devonshire Equestrian Tack Shop & Center	2055 N Russell Rd	Bloomington	IN	812/330-0261
Gold Star Saddlery	6929 Black Rd	New Haven	IN	219/493-4042
Golden Royal Western & English	2603 Southeastern Ave	Indianapolis	IN	317/862-3070
Grand Champion	9701 N Michigan Rd	Carmel	IN	317/872-4248
Hartmeyer Saddlery Shop	7111 W Bethal Ave	Munciel	IN	317/759-9507
Horse Country of Galena	2525 E 850 N	La Portel	IN	219/778-4625
Hunter Hill Stables Tack Shop	3329 W County Line Rd S	Fort Wayne	IN	219/625-3286
Red Arrow Tack Shop	3848 Academy Rd	Michigan City	IN	219/872-2114
Rockwell Stables Tack Shop	RR1 Box 2	Guilford	IN	812/487-2825
The Horse Center Inc	2348 County Rd 60	Auburn	IN	219/925-4913
The Loft Tack Shop	12711 S 400 E	Romney	IN	317/538-2969
Tony's Saddle Shop	365 E US Hwy 30	Valparaiso	IN	219/464-8216
Winning Ticket Saddlery	8047 W US Hwy 30	Larwill	IN	219/327-3040
Ye Old Tack Shoppe	RR2 Box 36A	Alexandrial	IN	317/664-8383
Zuckerbergs	1518 E Washington St	Indianapolis	IN	317/634-2342

Kansas

Horse Hardware Inc.	7801 W 151st St	Overland Park	KS	913/897-3173
Something Different Uniform	339 Colorado St	Manhattan	KS	913/537-1171

Kentucky

Bob Mickler's Inc	1093 W High St	Lexington	KY	606/254-3814
Carl Meyers Riding Apparel	113 Walton Ave	Lexington	KY	606/252-2004
Chocolate Drop Tack Shop	8511 US Highway 42	Florence	KY	606/371-3767
Goshen Saddlery	4501 W Hwy 42	Groshen	KY	502/228-0110
Propect Horse And Rider Inc.	9561 US Hwy 42	Prospect	KY	502/228-9214
The Hitching Post Inc.	11403 Old Shelbyville Rd	Middletown	KY	502/245-4672
The Livery Stable	114 East Bruen St	Midway	KY	606/846-4238
The Tack world	319 Central Ave	Louisville	KY	502/368-2161
Throughbreds Unlimited	PO Box 541	Georgetown	KY	502/857-9966
Wise Choice Tack	4401 Harrodsburg Rd	Lexington	KY	606/224-8976

Louisiana

Caplan's Inc	916 3rd St	Alexandria	LA	318/443-8816
English Riding Shop	848 N Collins Blvd	Covington	LA	504/892-2283
English Riding Shop	3330 Ridgelake Dr	Metairie	LA	504/828-3628
Everything Equine	3418 Woodvine Cir	Haughton	LA	318/949-3477
Sunshine Tack	3817 S Ramsey Dr	Baton Rouge	LA	504/344-2377
The Stable Door LTD	832 East Boston Commons #3	Covington	LA	504/893-5558
Vyrona's Uniforms	721 Ryan St	Lake Charles	LA	318/439-2476

Maine

The Saddlery At King Oak Farm	785 College Hwy	Southhampton	MA	413/527-4454
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Bay State Uniform Co Inc.		Boston	MA	617/542-2231
Briggs' Stable & Tack Shop	623 Hanover St	Hanover	MA	617/826-3191
Country Tack & Supply	495 N Main St	Lanesboro	MA	413/499-0277
Dover Saddlery	41 Pope Rd	Holliston	MA	617/235-1411
Fieldcrest Tack Shop	10 Sippewissett Rd	Falmouth	MA	617/640-1222
Fox Lea Farm Tack Shop	113 Danforth St	Rehoboth	MA	617/252-6541
Horse N' Habit	11 S Main St	Sherborn	MA	508/651-0014
Horseman's LTD	10 Winthrop St	Rehoboth	MA	508/252-5331
Hughes Horse and Rider	1095 Randolph St	Canton	MA	617/828-1681
M & S Police Supply Inc.	6 Main St	Somerville	MA	617/628-4444
Rowley Harness Shop	115 Central St	Rowley	MA	508/948-2590
Sackett Ridge Saddlery	1110 Southhampton Rd	Westfield	MA	413/568-6430
Saddled With Pets	191 Barre Paxton Rd	Rutland	MA	508/886-2442
Stonebrook Saddlery	25 College St	South Hadley	MA	413/536-6910
The Equestrian Shop Inc.	1812 Turnpike St	North Andover	MA	508/686-7722
Vanson Leather Inc.	213 Turnpike St	Stoughton	MA	617/344-5444

Maryland

Betty's Rest Saddlery	1718 Chapel Rd	Havre De Grace	MD	410/272-5820
Bits & Bridles Saddlery LTD	10176 Baltimore National Pike	Ellicott City	MD	410/750-7797
Dominion Saddlery	1041 Rte 3 N Ste 11	Gambrills	MD	410/451-2174
Fiddler's Green	1305 Salisbury St.	Salisbury	MD	410/543-0699
Fiddler's Green	1305 Division St	Salisbury	MD	410/543-0699

Horse Unlimited	1149 Telegraph Rd	Rising Sun	MD	410/658-4126
Hunt Valley Saddlery	118 Shawan Rd	Cockeysville	MD	410/771-6887
Maryland Saddlery	10811 Reisterstown Rd	Owings Mills	MD	301/581-0800
Ponies & Pals	213 Tippin Dr	Thurmont	MD	301/271-4011
Potomac Horse Tack Shop	14211 Quince Orchard Rd	Gaithersburg	MD	301/926-1166
Rock-N-Horse	169 Defense Hwy	Annapolis	MD	410/266-9239
Slippery Hill Tack Shop	1035 Biggs Hwy	Rising Sun	MD	301/658-4831
Spring Hill Tack Shop	2021 High Point Rd	Forest Hill	MD	301/838-4643
Stablemates Saddlery	4502 Baltimore National Pike	Mount Airy	MD	301/829-0333
Stockon Saddlery	14227 Jarrettstown Pike	Phoenix	MD	301/666-3352
The Buckboard	10302 Coppermine Rd	Woodsboro	MD	301/845-2458
The Grey Pony Saddlery	309 Main St	Laurel	MD	301/953-2374
The Surrey	10707 River Rd	Potomac	MD	301/365-1250
Vordemberge Saddlery Inc.	2113 Greenspring Dr	Timonium	MD	410/252-3210

Michigan

Arizona Saddlery	1687 S Woodward Ave	Birmingham	MI	313/646-6615
Black Forest Saddlery	2787 Quick Rd	Harbor Springs	MI	616/526-7066
Cheerio Riding Center	71221 County Rd 388	South Haven	MI	616/637-8377
Circle R Saddlery	18288 Inkster Rd	Romulus	MI	313/941-9165
Classic Saddlery LTD	492 N 33rd St	Galesburg	MI	616/665-9974

Covered Wagon Saddlery Inc.	20 S Wahington St	Oxford	MI	313/628-1849
Custom Fox Inc	9117 Secor Rd	Temperance	MI	313/856-6396
Fred A. Ferris Saddlery	5121 Mile Rd	South Lyon	MI	313/437-0201
High Point Saddlery	1507 N Leroy St	Fenton	MI	810/750-1966
Horses' Stuff Saddlery	1109 Castlewood St	White Lake	MI	810/360-6154
Indian Creek Saddlery	4346 Fillmore St	Jenison	MI	616/669-1674
Nottingham Equestrian Center	16848 Tower Rd	East Lansing	MI	517/351-7304
Phillp Hawk Saddler/Shoemaker	110 E Liberty St	Plymouth	MI	313/455-4295
Rochester Hills Stables Inc.	PO Box 173	Romeo	MI	313/752-9520
Rowe Tack Store	1595 Jolly Rd	Okemos	MI	517/349-1123
Saddle Stop	11953 Cleveland Ave	Nunica	MI	616/837-6705
Schultz's	450 Willoughby Rd	Mason	MI	517/655-1771
Simmons Saddlery	68820 Lowepland Rd	Richmond	MI	313/727-1866
St George Equestrian Center Inc.	9101 E Parker Rd	Laingsburg	MI	517/651-6755
Stoney Creek Farm Tack Shop	1460 Mead Rd	Rochester	MI	313/651-3398
Stoney Ridge Tack Shop	9970 Liberty Rd	Chelsea	MI	313/994-0884
The Bridle Path	460 Ada Dr SE	ADA	MI	616/676-0020
The Franklin Saddler	4100 Telegraph Rd	Bloomfield Hills	MI	313/647-3120
The Great Lake Saddlery	22271 Pontiac Trl	South Lyon	MI	810/437-0555
The Livery	850 Dryen Rd	Metamora	MI	810/678-3461
The Riding Club	503 N 3rd St	Marquette	MI	906/228-9033

The Tack Room	3808 S Division Ave	Grand Rapids	MI	616/243-1040
Tom's Western Store	8982 East M- 21	Ovid	MI	517/834-5446
Village Blacksmith Shop Inc.	484 Huron St	Mackinac Island	MI	906/847-3853
Willow Farm	5048 US Hwy 41 S	Marquette	MI	906/249-1414
Willow Farm Tack & Saddle	14960 State Rd	Spring Lake	MI	616/846-8449
Wiona Acres	10209 Portage Rd	Portage	MI	616/323-1426
Wyldeewood Tack Inc.	8085 Secor Rd	Lambertville	MI	313/856-4646

Minnesota

Brockton Hill Tack	21513 129th Ave N	Rogers	MN	612/428-3625
Calamity Jeanne's Saddle Shop	2460 W Industrial Blvd	Long Lake	MN	612/473-0546
Drovers	500 Farwell Ave	So. St. Paul	MN	612/450-9322
Fox Run Farm	10596 83rd St N	Stillwater	MN	
Hartley Woodward Inc	633 East Lane St	Wayzata	MN	612/404-2213
Schatzlein Saddle Shop Inc	413 W Lake St	Minneapolis	MN	612/825-2459
St Croix Saddlery	4858 Banning Ave	White Bear Lake	MN	612/426-0831
The Electric Horseman	RR1 Box 38	Mentor	MN	218/637-2292
The Loft Tack Shop	RR1 Box 229	Mankato	MN	507/388-5985

Missouri

Chuck's Boots Inc.	4109 S Hwy 94	St. Peters	MO	816/690-8677
Griffey Uniforms	315 W 17th St	Kansas City	MO	816/474-4300
The Hobby Horse LTD	2306 Business Loop 70 E	Columbia	MO	314/443-8315
The Horse Fair	6105 N Oakland Gravel Rd	Columbia	MO	314/474-2515

The Strawhorse LTD	125 D Long Rd	Chesterfield	MO	314/537-1522
The Tack Room Saddlery	10325 Lylewood Dr	St. Louis	MO	314/993-1377

Mississippi

Circle "D" Tack Shop	2636 Cal Vernon Rd	Caledonia	MS	601/356-6529
JJ's Saddle Shop	9175 Highway 98 West Suite #3	Hattiesburg	MS	601/264-1101
Stinson's Saddlery	RR2 Box 2	Terry	MS	601/878-6625
Tackfully Yours	558 Highway 51 No.	Ridgeland	MS	601/853-6623
Wildwood Tack Shop	15461 Northup Cuevas Rd	Gulfport	MS	601/356-6529

Montana

Cottonwood Tack	8302 Starling Dr	Bozeman	MT	406/586-4000
McCallums	5440 White Birch Lane	Kalispell	MT	

North Carolina

Balsam Quarter Tac Inc.	521 Long Shoals Rd	Arden	NC	704/684-8445
Cabin Branch Tack Shop	210 SW Broad St #232	Southern Pines	NC	910/692-8241
Equestrian Outfitters	200 N Greensboro St	Carrboro	NC	919/969-0005
Harmony Farm Stable & Tack Shop	8112 Old Hwy 86	Chapel Hill	NC	919/942-8081
Horse & Rider Inc.	5549 W Market St	Greensboro	NC	919/852-0906
Hunter's Run Stable & Tack	RR 8 Box 620	Morganton	NC	704/584-3369
Innovations	517 Hillsborough St	Raleigh	NC	919/833-4833
Longwood Tack Shop	4263 Hwy 751	Apex	NC	919/387-9400
Macnair Tack Shop Inc.	2721 Dover Farm Rd	Raleigh	NC	919/851-0102
Pat's Saddle Shop	RR2 Box East 525	Raleigh	NC	919/772-1615

Purgason's Leather	4901 Auburn Rd	Summerfield	NC	910/643-5353
Rock Springs Tack Shop	500 Aaron Cir	Greenville	NC	919/758-9700
Southern Pines Tack	Youngs Rd & US Hwy 1 No.	Southern Pines	NC	919/692-1100
Sport Horse Saddlery Inc.	112 No. Broome St	Waxham	NC	704/843-1191
Springwood Farm Tack & Apparel	1507 Elmdale Rd	Burlington	NC	919/449-7228
The Irish Pony In	501 Aaron Cir	Greenville	NC	919/758-7888
Thoroughbred Training Center	158 Mccashin Ln	Mocksville	NC	919/998-5280
Triangle Horse Sports Inc	5910 Duraleigh Rd	Raleigh	NC	919/781-8027
Tweed Shops Inc.	1011 Palmer Plaza Ln	Charlotte	NC	704/364-1410

Nebraska

Regg and Wally's Tack	1040 No. 204th Av	Elkhorn	NE	402/289-1175
The Paddock	737 N 11th St	Omaha	NE	402/493-0936

New Hampshire

Clark Farm Saddlery	East Holderness Rd	Holderness	NH	603/968-3565
Merrimack Farm & Country Store	Main Street	Bradford	NH	603/938-2211
Neill-Robertson Saddlery	46 Wednesday Hill Rd	Lee	NH	603/659-2772
Parade Acres Tack & Harness	54 Garvins Falls Rd	Concord	NH	603/228-9027
The Hunting Horn	RR2 Box 127	Peterborough	NH	603/563-8078

New Mexico

Black Horse LTD Inc.	3420 Lomas Blvd NE	Albuquerque	NM	505/255-9566
Dan's Boots And Saddles	6903 4th St NW	Albuquerque	NM	505/345-2220
Del Sol Equestrian Ctr	6715 Isleta Blvd SW	Albuquerque	NM	505/873-0888
Equine Designs	Old Road North	Lamy	NM	505/988-4075
Santa Fe Western Mercantile	6820 Cerrillos Rd	Sante Fe	NM	505/471-3655

Simons Uniforms Inc.	4716 Central Ave SE	Albuquerque	NM	505/266-0507
The Tack Room	120 Morningside Dr SE	Albuquerque	NM	505/255-1266
TLC of New Mexico	1427 Wyoming Blvd NE	Albuquerque	NM	505/271-2735

Nevada

Crossrail English Saddlery	1970 US Highway 50 E	Carson	NV	702/746-3669
Flying Changes	1600 W Huffaker Ln	Reno	NV	702/852-4710
Horse "N" Around	1859 N Decatur Blvd	Las Vegas	NV	702/646-1859
J K Korral	2145 Sutro St	Reno	NV	702/329-6995
Silk Purse Tack	8101 Racel St	Las Vegas	NV	702/645-3224
Silver State Uniforms	235 Keystone Ave	Reno	NV	702/323-4452
The English Shop	7466 S Virginia St	Reno	NV	702/853-6007
The Hilltopper	425 W Laramie	Reno	NV	702/849-1849
Uniforms Inc.	1079 S Commerce St	Las Vegas	NV	702/382-2236

New York

Barry's Saddle & Repair	192 Laurel Rd	East Hampton	NY	516/754-2727
Bedford Saddlery Inc.	56 Babbitt Rd	Bedford Hills	NY	914/666-7310
Berwick LTD	1669 Western Ave	Albany	NY	518/456-2955
Bob's Saddle & Tack Repair	9471 Brewerton Rd	Brewerton	NY	315/676-4366
Brennans Bit & Bridle	Bridehampton Commons	Bridgehampton	NY	516/537-0635
Brentwood Camp Inc.	RD #1 Box 265 Angelica 14709	Wellsville	NY	716/466-7444
Brown's Emporium	37 Main St	Chatham	NY	518/392-2541
CM Hadfield's Saddlery Inc.	450 Horan Rd	Syracuse	NY	315/488-1258

Con-Tack	114 West Lerley Corners Rd	Tivoli	NY	912/757-4442
Danny's Tack Shop`	70 Clinton St	Tully	NY	315/696-8036
Double "J" Saddlery	1845 East Homer Ave	Cortland	NY	607/756-5989
Gone Away Farm Tack Shop	Browning Rd	Hyde Park	NY	914/266-5043
Green Valley Tack Inc.	Country Route 1	Pine Island	NY	914/258-3564
Hobby Horse Saddlery	44 West Jericho Turnpike	Huntington	NY	516/692-2730
Horse Haven Saddlery Inc.	28E Jobs Ln	Southampton	NY	516/287-7065
Horseman's Corner	307 White Plains Rd	Eastchester	NY	888/961-TACK
Hunter's Cross LTD	Route 121	North Salem	NY	914/669-8001
Impressions of Saratoga Inc.	368 Broadway	Saratoga Springs	NY	518/587-0666
Jamestown Saddlery	Main Road	Aquebogue	NY	516/722-5882
Jansen Brothers Inc.	185 Elm St	Buffalo	NY	716/852-1179
Lighting G Horseman's Shop	Clapp Hill rd.	LaGrangevill e	NY	914/223-3588
Mid-Lantic Tack & Apparel	Farley Ln	Goshen	NY	914/294-8134
Millbrook Tack Shop LTD	Franklin Ave	Millbrook	NY	914/677-8225
Misty Moors Saddlery	West Port Bay Rd	Wolcott	NY	315/594-9542
North Shore Saddlery LTD	6308 Northern Blvd	East Norwich	NY	516/922-9198
Red Horse Equestrian	74 Montauk Hwy	East Hampton	NY	516/324-0200
Rhinebeck Tack & Leather	Route 9 Box 321	Rhinebeck	NY	914/876-4287
Rider's Crossing	357 Riverview Rd	Rexford	NY	518/383-2931
Robeson Saddlery LTD	3808 Rush Mendon Rd	Mendon	NY	716/624-1512

Saddle Up Tack Shop	30 Sound Ave	Calverton	NY	
Salem Saddlery LTD	Route 121	North Salem	NY	914/669-5900
Smithtown Saddlery	24 Bellemeade Ave	Smithtown	NY	516/361-9187
T.H.E. Tack Shop	6816 Main St	Williamsville	NY	716/626-0480
Tailored Sportsman Inc.	459 W 15th St	New York	NY	212/929-2860
The Country Riding Shop	Route 25A & Bennetts Rd	Setauket	NY	516/941-9665
The Fox Den	Franklin St Rd	Auburn	NY	315/252-1814
The Hunting Horn	Route 116	North Salem	NY	914/669-8640
The Leather Man Inc	111 Christopher St	New York	NY	212/243-5339
The Moose	261 W 19th St	New York	NY	212/807-1789
The Riding Shop Inc.	3333 Veterans Memorial Hwy	Ronkonkoma	NY	516/471-5050
The Saddle Shop	River Rd	Marcy	NY	315/736-3252
The Spotted Horse	19 Central Square	Chatham	NY	518/392-4666
The Tack Box Inc	92 Main St	Tappan	NY	914/359-6688
White's Tack Shop	7716 Victor Mendon Rd	Victor	NY	716/924-5684

Ohio

Becht & Son	11950 Fallcreek Ln	Loveland	OH	513/697-8290
Clip-ity Clop Saddle Shop	12930 Chippewa Rd	Brecksville	OH	216/526-2965
D.C.I. Tack Shoppe Inc	2279 E Union Rd	Jefferson	OH	216/858-2244
Detchon's Tack Shop	6349 Leffingwell Rd	Canfield	OH	216/533-6630
Dublin Tack Shoppe	24 N High St	Dublin	OH	614/889-1965
Fechheimer	4545 Malsbary Rd	Cincinnati	OH	513/793-5400
Kimmel's	462 Mathews Rd	Youngstown	OH	216/782-1379

McMauley & Company	463 Wards Corner Rd	Loveland	OH	513/697-5551
Montrose Saddlery	1724 Wilbur Rd	Medina	OH	216/239-2726
Paddock Saddlery	10289 Kinsman Rd	Newbury	OH	216/338-1366
Red Fox Stables Inc.	1342 US Hwy 50	Milford	OH	513/831-5010
Riding Run Farm & Saddlery	3207 Riding Run Rd	Richfield	OH	216/659-4633
Roy Tailor Uniform Co	1830 Dalton Ave	Cincinnati	OH	513/621-4787
Roy Tailor Uniform Co	3889 Business Park Dr	Columbus	OH	614/351-1566
Schneider Saddlery Inc	8255 E Washington St	Chagrin Falls	OH	216/543-2700
Shuttler's Uniforms Inc.	6594 Mayfield Rd	Mayfield Heights	OH	216/646-9600
Sor-Rell's	33 S Main St	Miamisburg	OH	513/866-3051
Stonewall Uniform Corp	110 Ken Mar Dr.	Broadview Hgts	OH	216/526-0001
Summerfield Saddlery	7830 Olentangy River Rd	Columbus	OH	614/436-9161
Superior Uniform Sales Inc.	821 Phillips Ave	Toledo	OH	419/476-9616
Tack Trunk Inc.	700 S US Rte 42	Lebanon	OH	513/932-4375
The Ohio Horseman Inc	288 Halligan Ave	Worthington	OH	614/885-7309
The Tack & Tie	8955 Kugler Mill Rd	Cincinnati	OH	513/831-8508
The Tack Loft	3665 Eeon Rd	Yellow Springs	OH	513/767-1011
The Tack Shoppe	12663 Chillicothe Rd	Chesterland	OH	216/729-9654
Trails End Tack Shop	7275 Hemple Rd	Dayton	OH	513/835-5062
Valley Tack Shop Inc.	6780 Center Rd	Valley City	OH	216/483-3366

Oklahoma

Battle Uniform Company	1241 S Walker Ave	Oklahoma City	OK	405/232-6431
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Jenks Feed & Supply	201 W Main St	Jenks	OK	918/299-9857
Kim Stables Tack Shop	9801 S Sheridan Rd	Tulsa	OK	918/299-9283
Phillips Police Co	6120 E Admiral Pl	Tulsa	OK	918/835-8027
Tener's Western Outfitters	4320 W Reno Ave	Oklahoma City	OK	405/946-5500
Trophy Tack Inc.	13329 S Memorial Dr	Bixby	OK	918/369-2293
Van Tac	RR1 Box 32N3	Washington	OK	405/288-6816
Windbreak Farm Tack Shop	3818 S Sangre Rd	Stillwater	OK	405/3779498
Xenophon	508 NW 164th St	Edmond	OK	405/341-7747

Oregon

Donn Leson Saddles	2883 Williams Hwy	Grants Pass	OR	503/476-1762
Gallops Saddlery	7060 SW Nyberg Rd	Tualatin	OR	503/692-3986
Knights Saddlery	Hermiston-McNary Hwy	Hermiston	OR	503/567-2056
Law & Order Order Supply LLC	101 S Grape St	Medford	OR	541/779-9656
Portland Outdoor Store	211 NE Roberts Ave	Gresham	OR	503/666-9088
Stirrup Cup	29955 SW Boones Ferry Rd	Wilsonville	OR	503/682-1626
Tack In The Box	2413 82nd Ave SE	Salem	OR	503/581-2935
The Country Corral	1793 Silverton Rd NE	Salem	OR	503/588-2761
The Sidesaddle Tack Shop	10414 NE Halsey St	Portland	OR	503/254-3100
The Stirrup Cup	500 NE Greenwood Ave	Bend	OR	503/389-1318
The Tack Room Saddlery Co	79 Fruitdale Dr	Grants Pass	OR	503/474-5092
V Bar V Western Shop	17500 SE Mcloughlin Blvd	Portland	OR	503/654-0467
Wildtree Farm & Tack Shop	5947 Elkhead Rd	Yoncalla	OR	503/849-2109

Pennsylvania

Bridle Path	Bridlewood R. D. 2	Shamokin	PA	717/648-5856
Buckle Downs LTD	288 Lancaster Ave	Frazer	PA	610/647-6668
Buck's County Saddlery LTD	4765 York Rd	Buckingham	PA	215/794-5411
F.M. Brown's Sons	797 Commerce St	Sinking Spring	PA	215/678-3353
Fox Heath Saddlery Inc.	1395 Swamp Rd	Furlong	PA	215/598-7792
Gentry Tack & Apparel	130 Fairview Rd	Chadds Ford	PA	215/388-2335
H & H Tack Shop Inc	No. Railroad St	Annville	PA	717/867-1651
Hawk Shadow Feed & Saddlery	Rd 2 Box 79- B	New Ringgold	PA	717/943-2035
Heritage Saddlery Inc.	1340 Pottstown Pike	West Chester	PA	215/431-3272
Hobby Horse Inc.	Rd 2 Glenfield Rd	Sewickley	PA	412/741-5243
Holly's Gwynedd Saddle	108 W Walnut St	North Wales	PA	215/699-7510
Horse & Rider Tack Shop	Rte 412 Bucksville Shop Ctr	Kintnersvill e	PA	215/847-2800
Horse Shoe Trail Supply	1747 W Main St	Ephrata	PA	717/721-9919
Horseworks Equestrian Center	13085 Perry Hwy	Wexford	PA	412/934-6773
Iron Spring Saddlery	Old Strottsville Rd	Coatsville	PA	610/383-4717
Kocher Farm & Tack	3951 W Whitehall Rd	Pennsylvania Furnace	PA	814/238-4124
Lehigh Valley Saddlery	26 S Broad St	Nazareth	PA	610/746-4857
Loyalhanna Tack Shop	122C N Market St	Ligonier	PA	412/238-5507
Outback Trading Co	29 S 3rd St	Oxford	PA	610/932-5008
Prestige Saddle & Harness	2150 Rosedale Rd	Quakertown	PA	215/538-1803

RLB Saddlery Inc.	2550 Brownsville Rd	Library	PA	412/854-5050
Rotham Uniform Company Inc	222 Saville Ave	Eddystone	PA	215/874-7145
Sol Neft Uniforms	M-13 Front and Ford St	Bridgeport	PA	215/275-6788
Stone River Tack Inc.	2 Klines Tun Rd	Wrightsville	PA	717/252-3056
The English Horn LTD	242 E McMurray Rd	McMurray	PA	412/941-8088
The Horse Connection	RR2	Pottstown	PA	610/469-6160
The Stone Mill Tack Shop	2500 Carlisle Rd	York	PA	717/764-3379
The Tack Room	100 Reitz Rd	Lewisburg	PA	717/523-3570
Unionville Saddle Shop Inc.	Main Street Box 485	Unionville	PA	215/347-2320

Rhode Island

Abe's Custom Shoe Service	761N Main St	Providence	RI	401/831-9543
Bancroft Saddlery Ltd	934 E Main Rd	Portsmouth	RI	401/683-0122
Yankee Saddle	5600 Post Rd	East Greenwich	RI	401/885-1910

South Carolina

Aiken Saddlery & Supplies	1044 E Pine Log Rd	Aiken	SC	803/649-6583
Cartwrights Riding Shop	106 E Rutherford St	Landrum	SC	803/457-3699
Equine Ventures	Burnt Church Park	Bluffton	SC	803/757-2226
Farm House Inc	22341 Asheville Hwy	Landrum	SC	803/457-3557
Horseman's Corner Saddlery	Broad Street	Camden	SC	803/432-2841
Southern Saddlery	880 Banks Mill Rd	Aiken	SC	803/641-0990
The Saddle Pad Tack Shop Inc	3330 W Palmetto St	Florence	SC	803/667-8585
The Tack Room	509 Dicey Ford Rd	Camden	SC	803/432-2264
The Tack Shop	1840 Gibbs Shoals Rd	Greer	SC	803/877-8928

Tennessee

Antiques Unlimited	628 State St	Bristol	TN	615/764-4211
Family Booterie II	3818 Cleghorn Ave	Nashville	TN	615/292-8880
Franklin Saddlery Co	2117 Hillsboro Rd	Franklin	TN	615/790-6773
Hilltop Tack Shop	2551 Liberty Rd	Talbott	TN	615/475-1509
Hunter Valley Tack	9111 Hunter Valley Ln	Knoxville	TN	615/691-8225
Judy's Tack Shop	2095 Exeter Rd # 35	Germantown	TN	901/755-5314
Saddles N' Such Inc	2135 S Germantown Rd	Germantown	TN	901/754-7452
Tagalong Farm	3815 Woodbury Pike	Murfreesboro	TN	615/893-7870
The Horse Habit	330 Main St	Hendersonville	TN	615/264-1542

Texas

Bazaar Uniforms	304 E Overland Ave	El Paso	TX	915/544-7340
Blarney Stone Tack Shop	114th St & Milwaukee Ave	Lubbock	TX	806/794-5888
Branding Ironwestern Corral Inc.	10831 Woodedge Dr	Houston	TX	281/469-4207
C&G Wholesale	10354 Miller Rd	Dallas	TX	214/343-3900
Cameron Tack	13404 Cameron Rd	Manor	TX	512/272-4301
Charlotte's Saddlery	11301 Katy Fwy	Houston	TX	281/465-8781
Charlotte's Saddlery	114 West Main St	Tomball	TX	281/351-1705
Cottle's Boot and Shoe Repair	2803 Wolflin	Amarillo	TX	806/352-8821
Horse & Rider World	200 Big Town Blvd	Mesquite	TX	214/328-2731
J B Battle Uniforms-Dallas	2415 W Northwest Hwy Ste 107	Dallas	TX	214/351-3250
Johnstown Feed & Saddlery	RR 18 Box 3250	Conroe	TX	281/689-0013

Kings Paddock Tack & Saddlery	3803 State Hwy 351	Abilene	TX	915/548-2560
Las Coinas Tack	600 Royal Lane	Irving	TX	214/869-0004
Moore Uniforms	4708 K Mart Dr Ste H	Wichita Falls	TX	817/692-4884
Newmarket Saddlery	Highway 377	Argyle	TX	806/464-3209
Peter West Uniforms	852 Secretary Dr	Arlington	TX	817/459-9013
Quail Hollow Tack	6474 Cross Timbers Rd	Flower Mound	TX	817/430-8250
R & R Uniforms	3830 Irving Blvd	Dallas	TX	214/634-7480
Ranchmart Saddle Tree Inc.	8462 Fredericksburg Rd	San Antonio	TX	210/614-1737
Red River Supply	4898 US Hwy 377 S	Aubrey	TX	817/365-0020
Red Wing Shoe Store	3128 Kermit Hwy	Odessa	TX	915/337-0071
Rocky's Police Equipment	5437 E Grand Ave	Dallas	TX	214/742-5578
Stelzig's	9511 Southwest Fwy	Houston	TX	
Stonebroke Saddlery	Stidham Rd	Conroe	TX	409/273-4679
Talland II Tack Shop	RR1 Box 312	Burleson	TX	817/295-8844
Teex Clothiers	3924 Leopard St	Corpus Christi	TX	512/888-9142
The Bridle Path	15210 Hwy 3 # 140	Webster	TX	281/480-8188
The Hackney	18627 State Hwy 249 # D	Houston	TX	281/469-4884
The Leading Rein	7739 Northcross Dr Ste C	Austin	TX	512/458-6637
The Saddle Shop	17398 Northwest Fwy	Houston	TX	713/937-7884
The Tack Rack	5400 North Big Spring Ste K	Midland	TX	915/682-8225

The Tack Room	8552 Memorial Dr	Houston	TX	281/686-0687
The Tack Shop	RR 7 Box 25B	Leander	TX	512/259-3479
Two Wheel World Inc	1922 W Pioneer Pky	Arlington	TX	817/261-0012
Uniforms Inc.	1489 Prudential Dr	Dallas	TX	214/630-0927
Victor II Just Boots	3601 S Texas Ave	Bryan	TX	409/846-4114
Wald's Police Supply Co Inc.	2206 Elm St #08	Dallas	TX	214/748-1060

Utah

AA Callister Corp	3615 S Redwood Rd	Salt Lake City	UT	801/973-7058
Ball Supply Co	88 6th Ave	Midvale	UT	801/255-2621
Cache Valley Horseman	1585 N Main St	Logan	UT	801/753-4573
Professional Armaments	3695 S Redwood Rd	West Valley Rd	UT	801/975-7422
Sporthorse Outfitters Ltd	64 E 11800 S	Draper	UT	801/571-9448
Strauss Uniforms & Equipment	2275 Southwest Temple	Salt Lake City	UT	801/487-4615
The Eagle Co	2207 S Main St	Salt Lake City	UT	801/487-6545

Virginia

Bits & Pieces	19 Amin St	Berryville	VA	540/955-3809
Boots & Saddlery LTD	13937 Willard Rd	Chantilly	VA	703/631-2554
Bridles 'N Bits	1955 Electric Rd # L	Salem	VA	540/389-3940
Clark's Feed Co	1000 Old Big Bethel Rd	Hampton	VA	804/838-1555
Clifton Saddlery II	521-F E Market St	Leesburg	VA	540/777-6790
Collegiate Tack Virginia Intermont College Training Ctr	20432 Stables Rd	Bristol	VA	703/ 669-8398
Commonwealth Tack	15 Lumber Dr	Sandston	VA	804/737-2500

Dominion Saddlery	43717 John Mosby Hwy	Chantilly	VA	540/327
Dominion Saddlery	2110 Barracks Rd	Charlottesville	VA	804/971-7469
Dominion Saddlery	8 East Washington St	Middleburg	VA	540/687-6720
Easy Rider LTD	1532 Millers Ln	Manakin Sabot	VA	804/784-0937
Full Cry Riding & Hunting Shop	6429 Clifton Rd	Clifton	VA	540/803-3725
Horse Country LTD	60 Alexandria Pike	Warrenton	VA	540/347-3141
Horse N Hound	Rte 522	Flint Hill	VA	540/675-1650
Hunters And Huntress LTD	RR1 Box 262	Natural Bridge	VA	703/291-2731
Lincoln Hill Saddlery	RR 5 Box 340	Lexington	VA	703/463-1585
Potomac Cobbler Inc.	14437 Jefferson Davis Hwy	Woodbridge	VA	703/491-4222
Quiet Shoppe Saddlery	3935 Poplar Hill Rd	Cheasapeake	VA	804/483-9358
Richmond Saddlery	10352 Washington Hwy	Ashland	VA	804/550-1997
Saddles 'N Stuff	Rte 220 North	Daleville	VA	540/992-4114
Skeeter's Tack & Leather Shop	5377 Telephone Rd	Warrenton	VA	540/347-0488
Southern States Cooperative	3119 Williamsburg Rd	Richmond	VA	804/226-2758
The Barracks Tack Shop	RR 5 Box 417	Charlottesville	VA	804/979-6189
The Clifton Saddlery	12644 Chapel Rd	Clifton	VA	540/830-7200
The Complete Horse LTD	8915 Patternson Ave	Richmond	VA	804/741-5823
The Saddlery	731 Walker Rd	Great Falls	VA	540/759-3500
The Stable Door	11 Main St	Warrenton	VA	540/347-2586
The Tack Box Inc.	3B West Federal St	Middleburg	VA	540/687-3231

The Tack Room	18 W Johnson St	Harrisonburg	VA	540/434-7171
The Tack shop	200 Bethlehem	Boones Mill	VA	540/334-1630
Western Ways	RR 5 Box 1160	Forest	VA	804/385-8011
Woodlawn Saddlery	8405 J Richmond Hwy	Alexandria	VA	540/360-2288

Washington

Bainbridge Saddlery LTD	8780 Fletcher Bay Rd NE	Bainbridge Island	WA	360/842-0482
Blumenthal Uniform Co	8610 Aurora Ave N	Seattle	WA	360/527-5277
Blumenthal Uniforms	4019 E Mission Ave	Spokane	WA	509/534-5068
Flying B Tack Shop	RR1 Box 799	Pullman	WA	509/872-3705
Happy Horse LTD.	17607 Pacific Ave S	Spanaway	WA	360/825-6922
Horse & Habit Inc.	17416 E Sprague Ave	Greenacres	WA	509/928-0442
JK Korral	1530 Black Lake Blvd SW	Olympia	WA	360/754-7071
Kroesen's Inc.	1918 Minor Ave	Seattle	WA	360/622-3853
Lighthouse Uniform Co Inc.	1532 15th Ave W	Seattle	WA	360/282-5600
Longacre Tack	2290 Dike Rd	Longview	WA	360/577-6201
Mike Wick Saddlery	195 Front St N	Issaquah	WA	360/392-6774
Mills Leather Shop	13620 NE 20th St	Bellevue	WA	360/746-9330
Napoleon LTD	10423 19th Ave S	Seattle	WA	360/248-0331
Olson's Tack Shop	11408 NE 2nd Pl	Bellevue	WA	360/454-9453
Professional Horseman's Supply	4040 Auburn Way N #3	Auburn	WA	360/813-0292
Riding LTD	RR1 Box 9	Valleyford	WA	509/448-0416
Silver Fox Saddlery Inc.	16717 Redmond Way	Redmond	WA	360/883-6735
Simon's Tag N' Togs	9210 S Tacoma Way	Tacoma	WA	360/'588-4546

Spotted Horse	4223 Meridian St	Bellingham	WA	360/671-7555
Stella's English Saddlery	8520 122nd Ave NE	Kirkland	WA	360/827-5606
Strauss Uniform & Equipment	136 SW 153rd St	Seattle	WA	360/241-6616
Stroh's Feed & Garden Supply Inc	3408 Hunt St NW	Gig Harbor	WA	206/858-2051
Tack Room Too Inc.	201 West Lee St	Olympia	WA	360/357-4268
Tack Trunk	11517 E Treat Ave	Spokane	WA	509/927-5891
Tack Unlimited	3302 Main St	Union Gap	WA	509/452-1272
The Bony Pony	1676 Old Hwy 99 S	Mt Vernon	WA	360/424-3500
The Equine Shoppe	20416 Viking Ave NW	Poulsbo	WA	360/697-2335
The Gift Horse Saddlery	1300 NE 175th St Ste 4	Woodinville	WA	206/481-2900

Wisconsin

Cottage Saddlery	219 Flambeau	Minocqua	WI	715/358-3142
Critter Feed 'N' Tack	10011 Highway West	Manitowish Waters	WI	715/543-2810
Hall Saddlery	1433 N Water St	Milwaukee	WI	414/782-4499
Horse and Hound	Country Plaza Rt 5 Hwy H N	Lake Geneva	WI	414/248-2171
Horse Emporium	805 Clinton St	Waukesha	WI	414/549-5422
Nimrod Farm	2208 N Summit Ave	Oconomowoc	WI	414/567-3103
Quinn Saddlery	604 W Lincoln Ave	Milwaukee	WI	414/643-5995
Ridgeview Stables & Riding Academy	7263 Ridgeview Rd	La Crosse	WI	608/782-3566
Saddlerycraft	1302 Gilbert Rd	Madison	WI	608/271-0545
Windy Willow Saddlery	1504 S Park Ave	Neenah	WI	414/722-7422

West Virginia

Ridsport International	RR1 Box 75	Waverly	WV	304/679-3822
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Stone Church Tack Shop	2112 Lumber Ave	Elm Groove	WV	304/242-1295
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Wyoming

English Leathers Saddlery Inc.	3 Reed Ln	Sheridan	WY	307/672-7352
Kings Saddlery Inc.	184 N Main St	Sheridan	WY	307/672-2702
Spring Creek Equestrian Center	Spring Gulch Rd	Jackson	WY	307/739-9062
The Tack Room	1301 S 3rd St	Laramie	Wy	307/745-6135

Australia

Eagle Leather	118 Hoddle st	Abbotsford	AU	613/419-4509
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New Zealand

Jo's Saddlery	Road 1	Palmerston N	NZ	NZ-63551338
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Bermuda

Horse Around Tack Shop	PO Box SN 246	Southhampton	BE	809/238-8211
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French West

Indies

Bayside Riding Club	c/o Club Orient Resort 97150	St. Martin	FWI	011-590- 873664
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Canada

Tack"N Up LTD	9606-82 Ave	Edmonton	AB	403/433-6734
Saddle Craft of Alberta	5534 Calagary Trail Southbend	Edmonton	AB	403/434-4331
A Ride in the Park Saddlery Inc.	196 A Ordze Ave	Sherwood Park	AB	403/449-2061
Snaffles Tores Inc.	710 20 Crowfoot Cres. NW	Calgary	AL	604/758-5301
Interstate Police Collectibles Inc.	#305 - 1303 Eighth Ave	New West Minister	BC	604/540-1315
Horses of Course Tack Shop Inc.	1207 Lonsdale Ave	North Vancouver	BC	604/984-7270
Stampede Tack LTD	17982 56th Ave	Surrey	BC	604/574-7427

Willow Wind Feed & Tack Shop	2714 Sooke Rd	Victoria	BC	604/478-8012
Maynard's Tack Shop	3249 West 51st Ave	Vancouver	BC	604/478-8012
Equestrian Ventures	1224 Mountain Ave	Winnipeg	MB	204/589-5562
Equestrian Elegance	PO Box 11	Springtein	MB	204/735-2592
Ted's Tack Shop LTD	2891 Oxford St.	Halifax	NS	902/455-4294
The Rider's Tack Box	1460 Bedford Way		NS	902/835-7433
Running Fox Equestrian Prod	8 Cushman	Catharine	ON	905/641-3686
Bahr Saddlery LTD	Steeles Ave. West	Hornby	ON	905/878-8885
West Equine Supply	468 Barrie St	Kingston	ON	613/549-6330
Larkin Tack & Harness	167 Main St	Lucan	ON	519/227-4782
Foxhunter Tack Shop	4341 Stouffervill e Rd	Stouffervill e	ON	416/640-5544
Northbound Leather LTD	19 St Nicholas St	Toronto	ON	416/485-5091
The Saddle Smith	RR1	Alton	ON	519/941-8967
Equidae Fine Saddlery & Riding Apparel Inc.	RR#2	King City	ON	416/833-2260
Pepin Harness Shop	5785 Metropolitan East	Montreal	QB	514/325-4612
Windhaven Farm Tack Shop	PO Box 282	Prince Albert	SA	306/764-8488
Regate Saddlery	PO Box 442	Wadena	SA	306/338-2408

Mexico

Maggui's Boutique Ecuestre	PO Box 5-611	Guadalajara	MX	36/211190
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United Kingdom

Village Saddlery	489 Warrington Rd	Culbeth	UK	0925-764532
Sian Saddlery	Coopers Green	Buxted Town	UK	082-581-2636

Equestro	Little Horwood	Buckinghamsh ire	UK	0296/71-2602
C.H. Brown & Son	52.53 The Market	Oxford	UK	0865 244700
Gidden Riding LTD	15 D Clifford St	London	UK	071/438-7288

The Netherlands

Black Body	Lynbaansgrac ht 2g2	1617 RM Amsterdam	HO	011-31-20- 6262553
Leslie A Sutcliffe	Jillesweg 7A 7603 CZ	Almelo	HO	0031/0546- 823142

Ireland

T.J. Callaghan & Company In.	15 Grafton Street	Dublin	IR	776661
Tipperary Tack Co. Inc.	The Square Fethard Co.	Tipperary	IR	052/317765

Japan

Pegasus Japan LTD.	321 Utsunomiya- shi	Shimo	JP	001-81-286- 56-0801
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Spain

Guadarmes	Eduardo Dato 13	Madrid	SP	34-1-319-3793
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